

Phase I Report January 16, 2015









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Section I – Market Analysis

Ballard*King & Associates as part of the LCA Architects project team, has been tasked with the development of a competitive market analysis for a possible community pool and fitness center in Kuna, Idaho.

The following is a summary of the basic demographic characteristics of the identified service areas along with sports and recreation participation standards as produced by the National Sporting Goods Association and cultural arts participation statistics developed by the National Endowment of the Arts.

Service Areas: The goal of the proposed community pool and fitness center would be to serve the residents of the City of Kuna and residents within the boundaries of the proposed Kuna Parks and Recreation District, as such the recreation district has been identified as the Primary Service Area for the proposed facility. It should be noted that the proposed Kuna Parks and Recreation District has very similar boundaries as the Kuna School District.

Primary Service Areas are usually defined by the distance people will travel on a regular basis (a minimum of once a week) to utilize a facility or its programs. Use by individuals outside of this area will be more limited and will focus more on special activities or events (tournaments, etc.).

Service areas can vary in size with the types of components that are included in a facility. A center with active elements (pool, weight cardiovascular equipment area, gym, track, etc.) will generally have a larger service area than a more passively oriented facility. Specialized facilities such as a sports field house, ice arena or large competitive aquatic venue will have even larger service areas that make them more of a regional destination.

Service areas can also be based upon a facility's proximity to major thoroughfares. Other factors impacting the use as it relates to driving distance are the presence of alternative service providers in the service area. Alternative service providers can have an impact upon membership, daily admissions and the associated penetration rates for programs and services.



Service Area Comparison Chart:

	City of Kuna	Primary Service Area
Population:	•	
2010 Census	15,720	27,029
2013 Estimate	15,740	27,809
2018 Estimate	16,913	29,569
Households:		
2010 Census	4,782	8,024
2013 Estimate	4,956	8,289
2018 Estimate	5,330	8,870
Families:		
2010 Census	3,838	6,522
2013 Estimate	3,974	6,693
2018 Estimate	4,240	7,107
Average Household Size:		
2010 Census	3.18	3.05
2013 Estimate	3.17	3.05
2018 Estimate	3.17	3.04
Ethnicity:		
Hispanic	9.0%	9.7%
White	90.9%	90.7%
Black	0.7%	0.9%
American Indian	0.9%	1.0%
Asian	0.7%	0.8%
Pacific Islander	0.2%	0.2%
Other	3.7%	3.8%
Multiple	2.9%	2.7%
Median Age:		
2010 Census	27.9	31.8
2013 Estimate	29.4	32.2
2018 Estimate	29.8	32.6
Median Income:		
2013 Estimate	\$50,816	\$53,428
2018 Estimate	\$56,866	\$61,799
Household Budget Expenditures ¹ :		
Housing	81	89
Entertainment & Recreation	85	93

¹ This information is placed on an index with a reference point being the National average of 100.

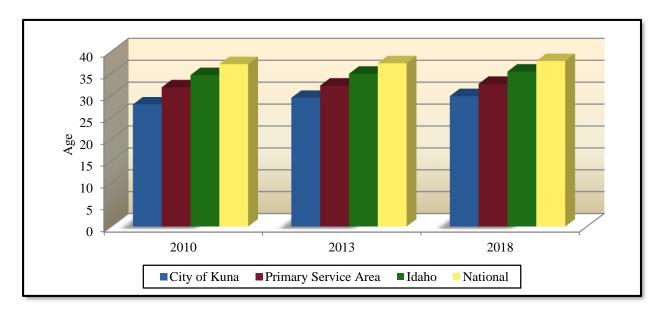


Age and Income: The median age and household income levels are compared with the national number as both of these factors are primary determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

Table A – Median Age:

	2010 Census	2013 Projection	2018 Projection
City of Kuna	27.9	29.4	29.8
Primary Service Area	31.8	32.2	32.6
State of Idaho	34.6	34.9	35.4
Nationally	37.1	37.6	38.1

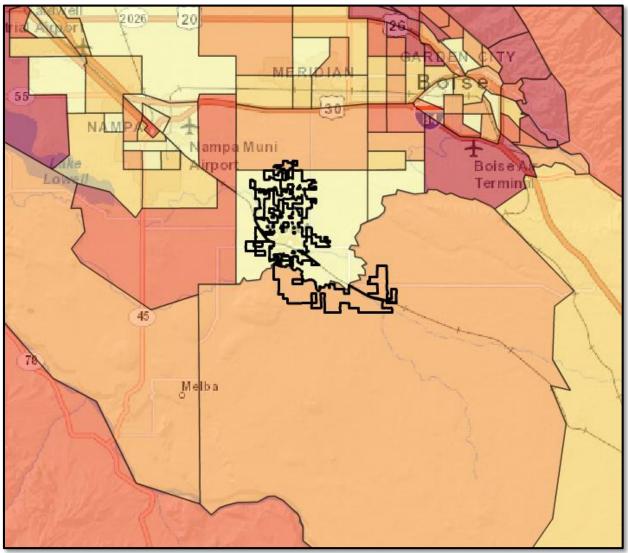
Chart A – Median Age:

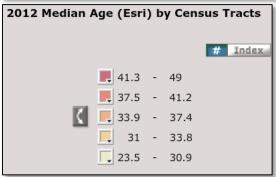


The median age decreases as you move away from the National number. The State of Idaho is lower than the National number, the Primary Service Area is lower than the State and the City of Kuna is lower than the Primary. The median age points to a high concentration of children, young families and young professionals.



Map A – Map of Median Age by Census Group:



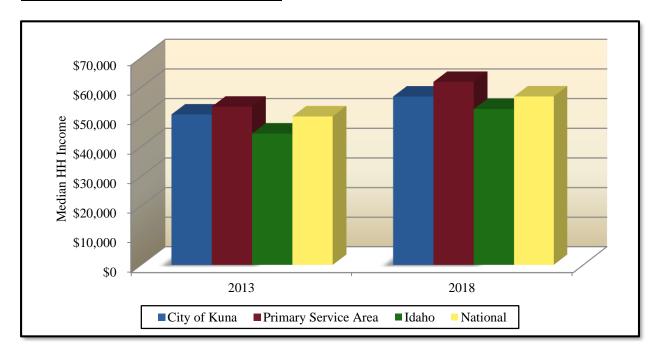




<u>Table B – Median Household Income:</u>

	2013 Estimate	2018 Projection
City of Kuna	\$50,816	\$56,866
Primary Service Area	\$53,428	\$61,799
State of Idaho	\$44,392	\$52,644
Nationally	\$51,314	\$59,580

Chart B – Median Household Income:





Based upon 2013 projections the following narrative can be provided for the service areas:

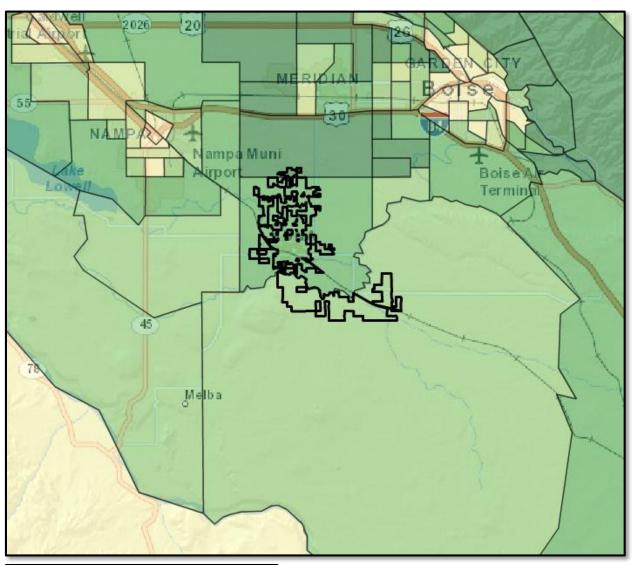
In the City of Kuna the percentage of households with median income over \$50,000 per year is 51.4% compared to 50.1% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 21.0% compared to a level of 24.7% nationally.

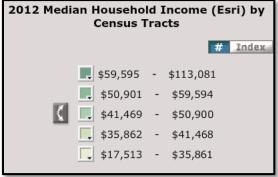
In the Primary Service Area the percentage of households with median income over \$50,000 per year is 55.4% compared to 50.1% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 19.6% compared to a level of 24.7% nationally.

The median household income for the State of Idaho is less than the National Number. However, in both the City of Kuna and the Primary Service Area the median household income is close to the National Number. This information will need to be balanced with overall cost of living in the service areas.



Map B – Map of Median Income by Census Block Group:







Household Budget Expenditures: In addition to taking a look at Median Age and Median Income, it is important to examine Household Budget Expenditures. In particular examining housing information; shelter, utilities, fuel and public services along with entertainment & recreation can provide a snap shot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the service areas.

<u>Table C – Household Budget Expenditures²:</u>

City of Kuna	SPI	Average Amount Spent	Percent
Housing	81	\$17,321.76	31.1%
Shelter	82	\$13,392.79	24.0%
Utilities, Fuel, Public Service	78	\$3,928.97	7.0%
Entertainment & Recreation	85	\$2,753.85	4.9%

Primary Service Area		Average Amount Spent	Percent
Housing	89	\$18,883.26	30.8%
Shelter	89	\$14,488.89	23.6%
Utilities, Fuel, Public Service	87	\$4,394.37	7.2%
Entertainment & Recreation	93	\$3,038.31	5.0%

State of Idaho	SPI	Average Amount Spent	Percent
Housing	79	\$16,928.69	30.5%
Shelter	78	\$12,727.15	22.9%
Utilities, Fuel, Public Service	83	\$4,201.54	7.6%
Entertainment & Recreation	84	\$2,743.77	4.9%

SPI: Spending Potential Index as compared to the National number of 100.

Average Amount Spent: The average amount spent per household.

Percent: Percent of the total 100% of household expenditures.

Note: Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.

² Consumer Spending data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2012 and 2018.



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<u>Chart C – Household Budget Expenditures Spending Potential Index:</u>

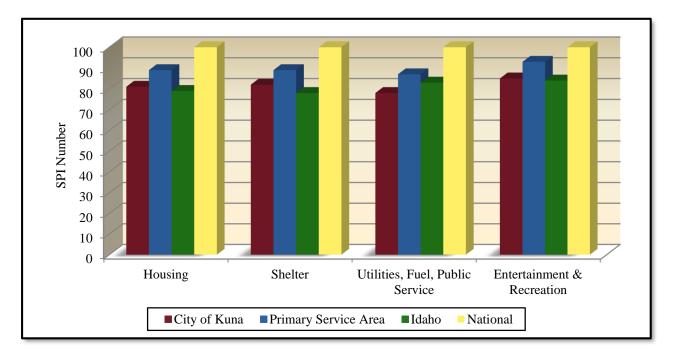


Table C, illustrates the Household Budget Expenditures Spending Potential Index in the service areas. The index for the State of Idaho is significantly less than the National Number. However, while the City of Kuna and Primary Service Area is less than the National number it is greater than the State of Idaho. This would mean that less dollars are being spent in comparison to the National level, but more than on the State level.

It will be important to keep this information in mind when developing a fee structure and looking at an appropriate cost recovery philosophy for the center.



Recreation Expenditures Spending Potential Index: Finally, through the demographic provider that B*K utilizes for the market analysis portion of the report, we are able to examine the overall propensity for households to spend dollars on recreation activities. The following comparisons are possible.

<u>Table D – Recreation Expenditures Spending Potential Index³:</u>

City of Kuna	SPI	Average Spent
Fees for Participant Sports	95	\$111.86
Fees for Recreational Lessons	87	\$108.08
Social, Recreation, Club Membership	90	\$149.41
Exercise Equipment/Game Tables	83	\$56.19
Other Sports Equipment	80	\$6.85

Primary Service Area	SPI	Average Spent
Fees for Participant Sports	100	\$117.84
Fees for Recreational Lessons	95	\$117.66
Social, Recreation, Club Membership	97	\$162.44
Exercise Equipment/Game Tables	91	\$61.75
Other Sports Equipment	89	\$7.65

State of Idaho	SPI	Average Spent
Fees for Participant Sports	79	\$93.04
Fees for Recreational Lessons	74	\$91.75
Social, Recreation, Club Membership	79	\$131.28
Exercise Equipment/Game Tables	79	\$53.47
Other Sports Equipment	88	\$7.52

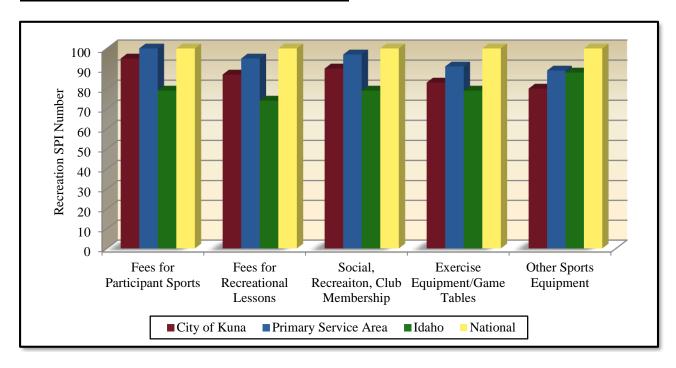
Average Amount Spent: The average amount spent for the service or item in a year.

SPI: Spending potential index as compared to the national number of 100.

³ Consumer Spending data are derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics.



Chart D – Recreation Spending Potential Index:

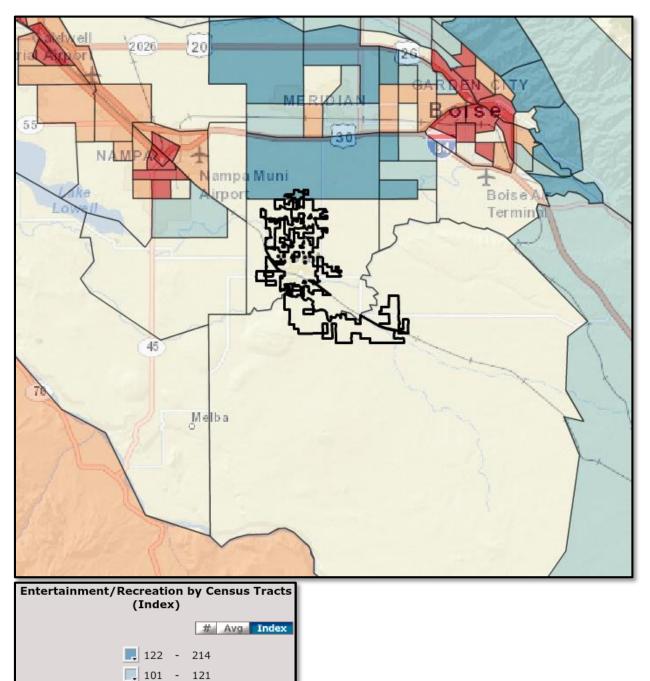


The Spending Potential Index for Recreation in both services areas and the State are lower than the National number. However, while the State is significantly lower than the National number the City of Kuna is above the State number and the Primary Service Area is above the City and almost equal to the National number.

It is also important to note that these dollars are currently being spent, so the identification of alternative service providers and the ability of another facility to capture a portion of these dollars will be important.



Map C – Map of Recreation Spending Potential Index by Census Block Group:





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Service Area Analysis

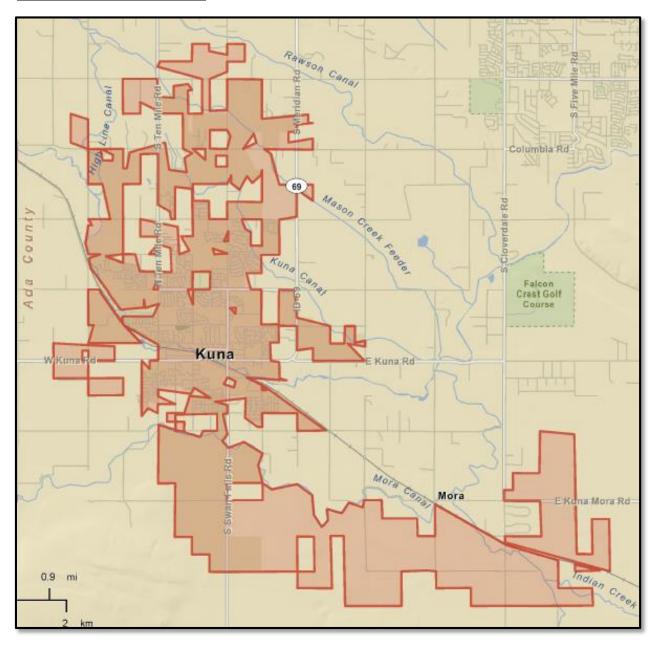
Each of the identified service area's demographic characteristics are now analyzed individually.

City of Kuna – City of Kuna proper.

Primary Service Area – includes the City of Kuna and the proposed Kuna Parks and Recreation District area.



Map D - City of Kuna Map





Population Distribution by Age: Utilizing census information for the City of Kuna, the following comparisons are possible.

Table E – 2013 City of Kuna Age Distribution

(ESRI estimates)

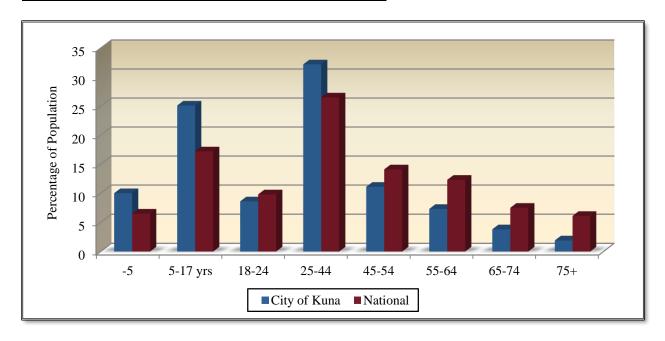
Ages	Population	% of Total	Nat. Population	Difference
-5	1,591	10.0%	6.5%	+3.5%
5-17	3,960	25.1%	17.2%	+7.9%
18-24	1,353	8.6%	9.8%	-1.2%
25-44	5,064	32.2%	26.5%	+5.7%
45-54	1,741	11.1%	14.1%	-3.0%
55-64	1,137	7.3%	12.3%	-5.0%
65-74	591	3.8%	7.5%	-4.7%
75+	300	1.9%	6.1%	-4.2%

Population: 2013 census estimates in the different age groups in the City of Kuna.

% of Total: Percentage of the City of Kuna/population in the age group.National Population: Percentage of the national population in the age group.

Difference: Percentage difference between the City of Kuna population and the national population.

<u>Chart E – 2013 City of Kuna Age Group Distribution</u>





MARKET ANALYSIS Kuna, ID

Community Pool and Fitness Center Feasibility Study

The demographic makeup of the City of Kuna, when compared to the characteristics of the national population, indicates that there are significant differences with a larger population in the -5, 5-17 and 25-44 age groups and a smaller population in the 18-24, 45-54, 55-64, 65-74 and 75+ age groups. The largest positive variance is in the 5-17 age group with +7.9%, while the greatest negative variance is in the 55-64 age group with -5.0%.



Population Distribution Comparison by Age: Utilizing census information from the City of Kuna, the following comparisons are possible.

Table F – 2013 City of Kuna Population Estimates

(U.S. Census Information and ESRI)

Ages	2010 Census	2013	2018	Percent	Percent
		Projection	Projection	Change	Change Nat'l
-5	1,694	1,591	1,744	+3.0%	+4.7%
5-17	4,044	3,960	4,174	+3.2%	+1.8%
18-24	1,132	1,353	1,414	+24.6%	-2.4%
25-44	5,341	5,064	5,396	+1.0%	+10.4%
45-54	1,473	1,741	1,892	+28.4%	-6.2%
55-64	851	1,137	1,230	+44.5%	+13.7%
65-74	430	591	717	+60.0%	+32.9%
75+	245	300	348	+42.0%	+9.5%

Chart F - City of Kuna Population Growth

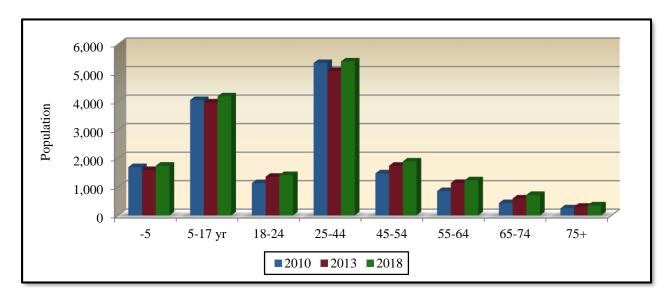


Table-F, illustrates the growth or decline in age group numbers from the 2010 census until the year 2018. It is projected that all of the age categories will see a substantial increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities.



Ethnicity and Race: Below is listed the distribution of the population by ethnicity and race for the City of Kuna utilizing 2013 population projections. Those numbers were developed from 2010 Census Data.

<u>Table G – City of Kuna Ethnic Population and Median Age</u> (Source – U.S. Census Bureau and ESRI)

Ethnicity	Total	Median Age	% of	% of ID	
	Population		Population	Population	
Hispanic	1,413	21.0	9.0%	12.1%	

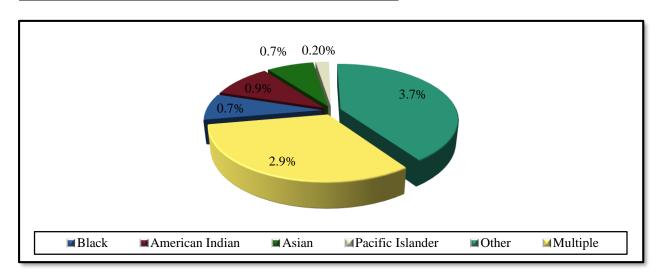
Table H – City of Kuna Population by Race and Median Age

(Source – U.S. Census Bureau and ESRI)

Race	Total	Median Age	% of	% of ID
	Population		Population	Population
White	14,312	30.2	90.9%	88.1%
Black	103	24.6	0.7%	0.8%
American Indian	137	28.8	0.9%	1.4%
Asian	118	34.1	0.7%	1.3%
Pacific Islander	24	20.6	0.2%	0.2%
Other	582	23.8	3.7%	5.5%
Multiple	463	15.5	2.9%	2.8%

2013 City of Kuna Total Population: 15,740 Residents

Chart G – City of Kuna Non-White Population by Race





Tapestry Segments: In addition to exploring the age group distribution, population growth along with ethnicity and race of the service area, B*K can further study the service area by examining the various tapestry segments. The following table outlines the top tapestry segments within the City of Kuna and provides definitions for each of the tapestries.

<u>Table I – City of Kuna Tapestry Segment Comparison</u>
(ESRI estimates)

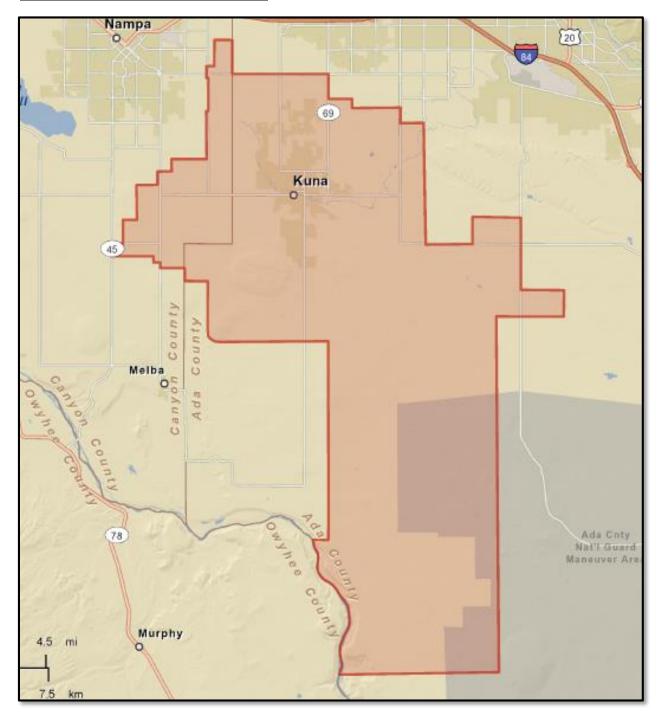
	City of Kuna		U.S. Households		
	Cumulative			Cumulative	
	Percent	Percent	Percent	Percent	
Up & Coming Families (12)	94.2%	94.2%	4.1%	4.1%	
Green Acres (17)	5.8%	100.0%	3.1%	7.2%	

Up & Coming Families (12) – With an annual household growth rate of 5.2%, this segment represents the second highest household growth market. A mix of Generation Xers and Baby Boomers with a median age of 31.9 years, this segment is the youngest of Tapestry's affluent family market. Residents of this segment are affluent families with young children. Most of the residents are white; however, diversity is increasing as the segment grows.

Green Acres (17) – Of the households in this segment 71% of the households are married couples with and without children. Many families are blue-collar Baby Boomers, many with children 6-17 years. This segment is not ethnically diverse; 92% of the residents are white.



Map E – Primary Service Area Map





Population Distribution by Age: Utilizing census information for the Primary Service Area, the following comparisons are possible.

<u>Table J – 2013 Primary Service Area Age Distribution</u>

(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
-5	2,279	8.2%	6.5%	+2.7%
5-17	6,020	21.7%	17.2%	+4.5%
18-24	2,500	8.9%	9.8%	-0.9%
25-44	8,910	32.0%	26.5%	+5.5%
45-54	3,606	13.0%	14.1%	-1.1%
55-64	2,508	9.0%	12.3%	-3.3%
65-74	1,331	4.7%	7.5%	-2.8%
75+	657	2.4%	6.1%	-3.7%

Population: 2013 census estimates in the different age groups in the Primary Service Area.

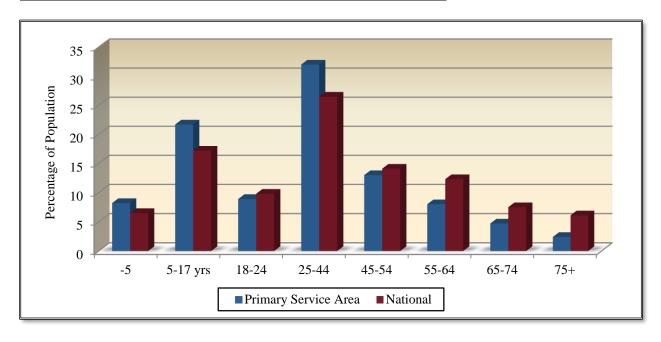
% of Total: Percentage of the Primary Service Area population in the age group.

National Population: Percentage of the national population in the age group.

Difference: Percentage difference between the Primary Service Area population and the national

population.

<u>Chart H – 2013 Primary Service Area Age Group Distribution</u>





MARKET ANALYSIS Kuna, ID

Community Pool and Fitness Center Feasibility Study

The demographic makeup of the Primary Service Area, when compared to the characteristics of the national population, indicates that there are significant differences with a larger population in the -5, 5-17 and 25-44 age groups and a smaller population in the 18-24, 45-54, 55-64, 65-74 and 75+ age groups. The largest positive variance is in the 25-44 age group with +5.5%, while the greatest negative variance is in the 75+ age group with -3.7%. These characteristics are similar to the City of Kuna's.



Population Distribution Comparison by Age: Utilizing census information from the Primary Service Area, the following comparisons are possible.

<u>Table K – 2013 Primary Service Area Population Estimates</u>

(U.S. Census Information and ESRI)

Ages	2010 Census	2013	2018	Percent	Percent
		Projection	Projection	Change	Change Nat'l
-5	2,232	2,279	2,488	+11.5%	+4.7%
5-17	6,132	6,020	6,274	+2.3%	+1.8%
18-24	2,182	2,500	2,556	+17.1%	-2.4%
25-44	8,937	8,910	9,372	+4.9%	+10.4%
45-54	3,461	3,606	3,793	+9.6%	-6.2%
55-64	2,318	2,508	2,659	+14.7%	+13.7%
65-74	1,129	1,331	1,664	+47.4%	+32.9%
75+	642	657	762	+18.7%	+9.5%

Chart I – Primary Service Area Population Growth

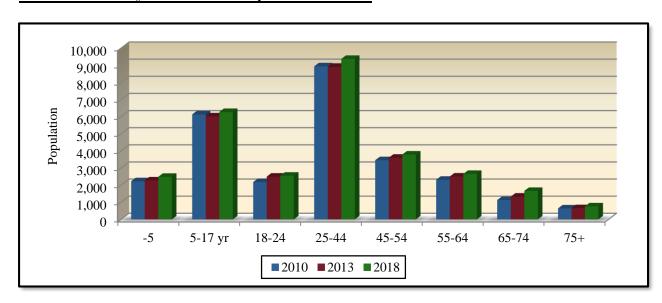


Table-K, illustrates the growth or decline in age group numbers from the 2010 census until the year 2018. It is projected that all of the age categories will see a substantial increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities.



Ethnicity and Race: Below is listed the distribution of the population by ethnicity and race for the Primary Service Area based on 2013 population projections. Those numbers were developed from 2010 Census Data.

Table L – Primary Service Area Ethnic Population and Median Age

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of ID Population	
Hispanic	2,684	25.3	9.7%	12.1%	

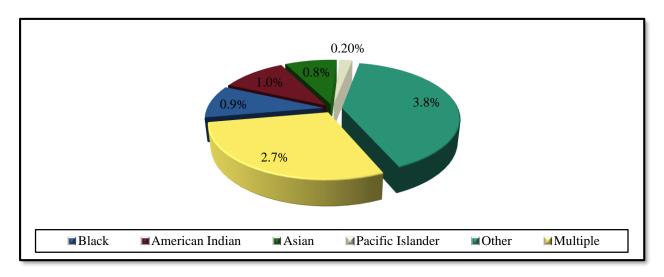
Table M - Primary Service Area Population by Race and Median Age

(Source – U.S. Census Bureau and ESRI)

Race	Total Population	Median Age	% of Population	% of ID Population
****		22.0		
White	25,220	32.9	90.7%	88.1%
Black	247	31.1	0.9%	0.8%
American Indian	290	32.9	1.0%	1.4%
Asian	210	34.8	0.8%	1.3%
Pacific Islander	49	22.5	0.2%	0.2%
Other	1,051	26.1	3.8%	5.5%
Multiple	743	18.7	2.7%	2.8%

2013 Primary Service Area Total Population: 27,809 Residents

Chart J – Primary Service Area Non-White Population by Race





Tapestry Segments: In addition to exploring the age group distribution, population growth along with ethnicity and race of the service area, B*K can further study the service area by examining the various tapestry segments. The following table outlines the top tapestry segments within the Primary Service Area and provides definitions for each of the tapestries.

<u>Table N – Primary Service Area Tapestry Segment Comparison</u>
(ESRI estimates)

	Primary So	ervice Area	U.S. Households		
		Cumulative		Cumulative	
	Percent	Percent	Percent	Percent	
Up & Coming Families (12)	64.8%	64.8%	4.1%	4.1%	
Green Acres (17)	30.3%	95.1%	3.1%	7.2%	
Salt of the Earth (25)	3.7%	98.8%	2.7%	9.9%	
Midland Crowd (26)	1.2%	100.0%	3.2%	13.1%	

Up & Coming Families (12) – With an annual household growth rate of 5.2%, this segment represents the second highest household growth market. A mix of Generation Xers and Baby Boomers with a median age of 31.9 years, this segment is the youngest of Tapestry's affluent family market. Residents of this segment are affluent families with young children. Most of the residents are white; however, diversity is increasing as the segment grows.

Green Acres (17) – Of the households in this segment 71% of the households are married couples with and without children. Many families are blue-collar Baby Boomers, many with children 6-17 years. This segment is not ethnically diverse; 92% of the residents are white.

Salt of the Earth (25) – Of the households in this segment 65% are married couples with and without children, while 20% of the households are singles who live alone. These neighborhoods are the least diverse of the Tapestry segments.

Midland Crowd (26) – Approximately 4% of the U.S. population identifies with this Tapestry segment. The median age of 37 years parallels that of the U.S. and 62% of the households are married couple families; ½ of them have families.



Demographic Summary

The following summarizes the demographic characteristics of the service areas.

- The City of Kuna has a relatively small population and will have difficulty supporting an indoor recreation facility without participants from outside of the city limits.
- The Primary Service Area's population is larger and would support a modest community recreation facility.
- The population of the two services areas are very comparable to one another. There are significant numbers of children and youth under the age of 18. Additionally there is a significant portion of the population that falls in the 25-44 age bracket indicating young families and young professionals.
- The cost of living is lower than the National Number. It should also be noted that the median household income level for both service areas is higher than the State as well.
- Both service areas are not diverse and are comprised mainly of White.
- The tapestry segments of the two service areas are similar to the population.



Sports Participation Numbers:

In addition to analyzing the demographic realities of the service areas, it is possible to project possible participation in recreation and sport activities.

Participation Numbers: On an annual basis the National Sporting Goods Association (NSGA) conducts an in-depth study and survey of how Americans spend their leisure time. This information provides the data necessary to overlay the rate of participation onto the Primary Service Area to determine market potential.

B*K takes the national average and combines that with participation percentages of the Primary Service Area based upon age distribution, median income and region. Those four percentages are then averaged together to create a unique sports participation percentage for the service area. This participation percentage when applied to the population of the Primary Service Area then provides an idea of the market potential for various activities.



Community Recreation Related Activities Participation: These activities are typical components of an active community recreation center.

Table O – Recreation Activity Participation Rates for the Primary Service Area

Activity	Age	Income	Region	Nation	Average
Aerobics	15.9%	15.7%	19.8%	15.7%	16.8%
Basketball	10.4%	8.6%	9.6%	9.0%	9.4%
Billiards/Pool	8.2%	7.6%	7.9%	7.7%	7.8%
Exercise Walking	33.9%	37.0%	37.1%	35.8%	36.0%
Exercise w/ Equipment	19.8%	21.4%	22.2%	20.2%	20.9%
Running/Jogging	15.6%	13.2%	14.8%	14.0%	14.4%
Swimming	18.3%	19.2%	16.9%	17.0%	17.8%
Volleyball	4.1%	3.2%	3.6%	3.6%	3.6%
Weight Lifting	11.2%	11.2%	13.2%	10.9%	11.6%
Workout @ Clubs	11.9%	12.8%	14.8%	12.3%	13.0%
Yoga	8.3%	7.8%	8.2%	8.0%	8.1%

	Age	Income	Region	Nation	Average
Did Not Participate	18.4%	16.3%	18.4%	21.9%	18.7%

Age: Participation based on individuals ages 7 & Up of the Primary Service Area.

Income: Participation based on the 2013 estimated median household income in the Primary Service

Area.

Region: Participation based on regional statistics (Mountain).

National: Participation based on national statistics.

Average: Average of the four columns.



Anticipated Participation Numbers by Activity: Utilizing the average percentage from Table-O above plus the 2010 census information and census estimates for 2013 and 2018 (over age 7) the following comparisons can be made.

<u>Table P – Participation Rates Primary Service Area</u>

Activity	Average	2010 Part.	2013 Part.	2018 Part.	Difference
Aerobics	16.8%	3,987	4,127	4,380	+393
Basketball	9.4%	2,232	2,310	2,452	+220
Billiards/Pool	7.8%	1,864	1,929	2,048	+184
Exercise Walking	36.0%	8,540	8,841	9,382	+842
Exercise w/ Equipment	20.9%	4,963	5,138	5,452	+489
Running/Jogging	14.4%	3,418	3,538	3,755	+337
Swimming	17.8%	4,240	4,389	4,658	+418
Volleyball	3.6%	859	890	944	+85
Weight Lifting	11.6%	2,762	2,859	3,034	+272
Workout @ Clubs	13.0%	3,078	3,187	3,382	+304
Yoga	8.1%	1,918	1,985	2,107	+189

	Average	2010 Part.	2013 Part.	2018 Part.	Difference
Did Not Participate	18.7%	4,452	4,609	4,891	+439

Note: The estimated participation numbers indicated above are for a variety of activities and do not translate into attendance figures for a new community pool and fitness center that is being proposed for Kuna. It should also be noted that the "Did Not Participate" statistics refers to all 50 activities outlined in the NSGA 2012 Survey Instrument.



Anticipated Annual Swimmer Days: Utilizing NSGA's 2012 survey information, B*K can determine the average number of times each of the groups listed below participated in swimming. Once that average has been determined it can be applied to the participation numbers from Table-P to provide an anticipated number of swimmer days within the service areas. Anticipated number of swimmer days can be defined as the number of times all of the individuals within the service area will swim during a year, regardless of duration.

<u>Table Q – Anticipated Annual Swimmer Days Primary Service Area</u>

National	Male	Female	Region	Income	Average
39.60	38.08	40.71	45.88	39.52	40.76

Average	2010 Part.	2013 Part.	2018 Part.	Difference
40.76	172,810	178,892	189,848	+17,039

This is a large number of swimmer days that are available in the Primary Service Area.



In addition to developing a unique participation percentage for the Primary Service Area and looking at the number of swimmer days, B*K also examines the frequency of participation in swimming according to the 2012 NSGA Survey. The chart below outlines that data.

<u>Table R – Participation Frequency</u>

	Frequent	Occasional	Infrequent
Swimming Frequency	110+	25-109	6-24
Swimming Percentage of Population	6.4%	45.0%	48.6%

In the chart above one can look at each activity and how it is defined with respect to visits being Frequent, Occasional or Infrequent and then the percentage of population that participates.

<u>Table S – Participation Numbers</u>

	Frequent	Occasional	Infrequent	Total
Swimming	112	67	15	
Population	281	1,975	2,133	
Visits	31,472	132,325	31,995	195,792

The table above takes the frequency information one step further and identifies the number of times an individual may participate in the activity, applies the percentage from Table-R to the population in Table-S and then gives a total number of aquatic facility visits. Those visits are not specific to one facility, but rather specific to the Primary Service Area population. In other words those visits are already taking place at the facilities within the service area.



Participation by Ethnicity and Race: Participation in sports activities is also tracked by ethnicity and race. The table below compares the overall rate of participation nationally with the rate for Hispanics and African Americans. Utilizing information provided by the National Sporting Goods Association's 2012 survey, the following comparisons are possible.

<u>Table T – Comparison of National, African American and Hispanic Participation Rates</u>

	Primary	National	African	Hispanic
	Service Area	Participation	American	Participation
			Participation	
Aerobics	16.8%	15.7%	13.0%	14.0%
Basketball	9.4%	9.0%	16.5%	10.4%
Billiards	7.8%	7.7%	5.9%	8.3%
Exercise Walking	36.0%	35.8%	32.4%	27.2%
Exercise w/ Equipment	20.9%	35.8%	15.9%	14.9%
Running/Jogging	14.4%	14.0%	12.0%	16.0%
Swimming	17.8%	17.0%	8.0%	11.8%
Volleyball	3.6%	3.6%	4.7%	4.5%
Weight Lifting	11.6%	10.9%	9.0%	9.7%
Workout @ Clubs	13.0%	12.3%	7.0%	9.6%
Yoga	8.1%	8.0%	7.5%	8.9%

Primary Service Part: The unique participation percentage developed for the Primary Service Area.
 National Rate: The national percentage of individuals who participate in the given activity.
 African American Rate: The percentage of African Americans who participate in the given activity.

Hispanic Rate: The percentage of Hispanics who participate in the given activity.

Based on the fact that there is not a significant Hispanic or African American population in Primary Service Area, those participation rates become less relevant to the impact on overall participation percentages. It should be noted that no participation rates are available for Asian or other minority populations.



Summary of Sports Participation: The following chart summarizes participation in both indoor and outdoor activities utilizing information from the 2013 National Sporting Goods Association survey.

<u>Table U – Sports Participation Summary</u>

Sport	Nat'l Rank ⁴	Nat'l Participation (in millions)	Primary Service	Primary Service Area Percentage
		,	Area Rank	Part.
Exercise Walking	1	102.1	1	36.0%
Exercising w/ Equipment	2	57.7	2	20.9%
Swimming	3	48.6	3	17.8%
Aerobic Exercising	5	44.8	4	16.8%
Running/Jogging	7	40.0	5	14.4%
Workout @ Club	10	35.2	6	13.0%
Weightlifting	11	31.1	7	11.6%
Basketball	13	25.6	8	9.4%
Yoga	14	22.9	9	8.1%
Billiards/Pool	15	21.8	10	7.8%
Volleyball	28	10.3	11	3.6%

Nat'l Rank: Popularity of sport based on national survey.

Nat'l Participation: Percent of population that participate in this sport on national survey.

Primary Service Rank: The rank of the activity within the Primary Service Area. **Primary Service %:** Ranking of activities based upon average from Table-O.

In Table-U the participation percentages for the nation and the Primary Service Area are relatively consistent with one another.

⁴ This rank is based upon the 51 activities reported on by NSGA in their 2012 survey instrument.



Market Potential: In addition to examining the participation numbers for various indoor activities through the NSGA 2012 Survey and the Spending Potential Index for Entertainment & Recreation, B*K can access information about Sports & Leisure Market Potential. The following information illustrates participation rates for adults in various activities in the Primary Service Area.

<u>Table V – Market Potential Index for Adult Participation in Activities</u>

Adults participated in:	Expected	Percent of	MPI
	Number of Adults	Population	
Aerobics	2,213	11.3%	114
Basketball	1,992	10.2%	109
Jogging/Running	2,443	12.5%	117
Pilates	745	3.8%	115
Swimming	4,605	23.6%	121
Volleyball	830	4.3%	121
Walking for Exercise	6,572	33.7%	113
Weightlifting	2,702	13.9%	117
Yoga	1,144	5.9%	100

Expected # of Adults: Number of adults, 18 years of age and older, participating in the activity in the Primary

Service Area.

Percent of Population: Percent of the service area that participates in the activity.

MPI: Market potential index as compared to the national number of 100.

This table indicates that the overall propensity for adults to participate in the various activities listed is higher than the national number of 100 in every instance. This can be attributed to a number of factors; with access to facilities and ability to pay being two of the most common.

Note: Information is only available for adult sports participation from this source.



Comparison of State Statistics with National Statistics: Utilizing information from the National Sporting Goods Association, the following charts illustrate the participation numbers in selected sports in the State of Idaho.

State of Idaho participation numbers in selected indoor and outdoor sports - As reported by the National Sporting Goods Association in 2012.

<u>Table W – Idaho Participation Rates</u>

Sport	Idaho Participation (in thousands)	Age Group	Largest Number
Exercise Walking	491	55-64	45-54
Exercising w/ Equipment	142	25-34	25-34
Swimming	208	7-11	35-44
Aerobic Exercising	170	25-34	25-34
Running/Jogging	118	18-24	25-34
Workout @ Club	77	18-24	45-54
Weightlifting	109	18-24	25-34
Basketball	222	12-17	12-17
Yoga	82	25-34	25-34
Billiards/Pool	226	25-34	25-34
Volleyball	148	12-17	12-17

ID Participation: The number of people (in thousands) in Idaho who participated more than once in the

activity in 2012 and are at least 7 years of age.

Age Group: The age group in which the sport is most popular or in other words, where the highest

percentage of the age group participates in the activity. (Example: The highest percent of an age group that participates in exercise walking is 55-64.) **This is a national statistic.**

Largest Number: The age group with the highest number of participants. Example: The greatest number of

exercise walkers is in the 45-54 age group. (Note: This statistic is driven more by the sheer number of people in the age group than by the popularity of the sport in the age span.) **This**

is a national statistic.



Idaho sport percentage of participation compared with the population percentage of the United States:

Idaho's population represents 0.5% of the population of the United States (based on 2013 Estimates).

<u>Table X – Idaho Participation Correlation</u>

Sport	Participation Percentages
Volleyball	1.4%
Billiards/Pool	1.0%
Basketball	0.9%
Exercise Walking	0.5%
Swimming	0.4%
Aerobic Exercising	0.4%
Weightlifting	0.4%
Yoga	0.4%
Running/Jogging	0.3%
Exercising w/ Equipment	0.2%
Workout @ Club	0.2%

Note: Sports participation percentages refer to the total percent of the national population that participates in a sport that comes from the State of Idaho's population. The fact that only 4 sports have a rate of participation equal to or above the percentage of the population indicates a lower level of participation in many of these sports activities.



Non-Sport Participation Statistics: It is recognized that many community recreation centers are more than just sports oriented facilities. Participation in a wide variety of passive activities and cultural pursuits is common and essential to a well-rounded center. This information is useful in determining some of the program participation and revenue in the operations section of the report.

While there is not an abundance of information available for participation in these types of activities as compared to sport activities, there are statistics that can be utilized to help determine the market for cultural arts activities and events.

There are many ways to measure a nation's cultural vitality. One way is to chart the public's involvement with arts events and other activities over time. The NEA's Survey of Public Participation in the Arts remains the largest periodic study of arts participation in the United States, and it is conducted in partnership with the U.S. Census Bureau. The large number of survey respondents – similar in make-up to the total U.S. adult population – permits a statistical snapshot of American's engagement with the arts by frequency and activity type. The survey has taken place five times since 1982, allowing researchers to compare the trends not only for the total adult population, but also for demographic subgroups.⁵

⁵ National Endowment for the Arts, Arts Participation 2008 Highlights from a National Survey.



Table Y – Percentage of U.S. Adult Population Attending Arts Performances: 1982-2008

				Rate of Change		
	1982	1992	2002	2008	2002-2008	1982-2008
Jazz	9.6%	10.6%	10.8%	7.8%	-28%	-19%
Classical Music	13.0%	12.5%	11.6%	9.3%	-20%	-29%
Opera	3.0%	3.3%	3.2%	2.1%	-34%	-30%
Musical Plays	18.6%	17.4%	17.1%	16.7%	-2%	-10%
Non-Musical Plays	11.9%	13.5%	12.3%	9.4%	-24%	-21%
Ballet	4.2%	4.7%	3.9%	2.9%	-26%	-31%

Smaller percentages of adults attended performing arts events than in previous years.

- Opera and jazz participation significantly decreased for the first time, with attendance rates falling below what they were in 1982.
- Classical music attendance continued to decline at a 29% rate since 1982 with the steepest drop occurring from 2002 to 2008
- Only musical play saw no statistically significant change in attendance since 2002.

<u>Table Z – Percentage of U.S. Adult Population Attending Art Museums, Parks and Festivals:</u>
<u>1982-2008</u>

					Rate of Change	
	1982	1992	2002	2008	2002-2008	1982-2008
Art	22.1%	26.7%	26.5%	22.7%	-14%	+3%
Museums/Galleries						
Parks/Historical	37.0%	34.5%	31.6%	24.9%	-21%	-33%
Buildings						
Craft/Visual Arts	39.0%	40.7%	33.4%	24.5%	-27%	-37%
Festivals						

Attendance for the most popular types of arts events – such as museums and craft fairs – also declined.

- After topping 26% in 1992 and 2002, the art museum attendance rate slipped to 23 percent in 2008 comparable to the 1982 level.
- The proportion of the U.S. adults touring parks or historical buildings has diminished by one-third since 1982.



Table AA – Median Age of Arts Attendees: 1982-2008

					Rate of Change	
	1982	1992	2002	2008	2002-2008	1982-2008
U.S. Adults, Average	39	41	43	45	+2	+6
Jazz	29	37	43	46	+4	+17
Classical Music	40	44	47	49	+2	+9
Opera	43	44	47	48	+1	+5
Musicals	39	42	44	45	+1	+6
Non-Musical Plays	39	42	44	47	+3	+8
Ballet	37	40	44	46	+2	+9
Art Museums	36	39	44	43	-1	+7

Long-term trends suggest fundamental shifts in the relationship between age and arts attendance.

- Performing arts attendees are increasingly older than the average U.S. adult.
- Jazz concert-goers are no longer the youngest group of arts participants.
- Since 1982, young adult (18-24 year old) attendance rates have declined significantly for jazz, classical music, ballet, and non-musical plays.
- From 2002 to 2008, however, 45-54 year olds historically a large component of arts audiences showed the steepest declines in attendance for most arts events.



<u>Table AB – Percentage of U.S. Adult Population Performing or Creating Art: 1992-2008</u>

				Rate of Change	
	1992	2002	2008	2002-2008	1982-2008
Performing:					
Jazz	1.7%	1.3%	1.3%	+0.0%	-0.4%
Classical Music	4.2%	1.8%	3.0%	+1.2%	-1.2%
Opera	1.1%	0.7%	0.4%	-0.3%	-0.7%
Choir/Chorus	6.3%	4.8%	5.2%	+0.4%	-1.1%
Musical Plays	3.8%	2.4%	0.9%	-1.5%	-2.9%
Non-Musical Plays	1.6%	1.4%	0.8%	-0.6%	-0.8%
Dance	8.1%	4.3%	2.1%	-2.2%	-6.0%
Making:					
Painting/Drawing	9.6%	8.6%	9.0%	+0.4%	-0.6%
Pottery/Ceramics	8.4%	6.9%	6.0%	-0.9%	-2.4%
Weaving/Sewing	24.8%	16.0%	13.1%	-2.9%	-11.7%
Photography	11.6%	11.5%	14.7%	+3.2%	+3.1%
Creative Writing	7.4%	7.0%	6.9%	-0.1%	-0.5%

Adults generally are creating or performing at lower rates – despite opportunities for displaying their work line.

- Only photography increased from 1992 to 2008 reflecting, perhaps, greater access through digital media.
- The proportion of U.S. adults doing creative writing has hovered around 7.0 percent.
- The rate of classical music performance slipped from 1992 to 2002 then grew over the next six years.
- The adult participation rate for weaving or sewing was almost twice as great in 1992 as in 2008. Yet this activity remains one of the most popular forms of art creation.



<u>Table AC – Percentage of U.S. Adult Population Viewing or Listening to Art Broadcasts or Recordings, 2008 (online media included)</u>

	Percentage	Millions of Adults
Jazz	14.2%	31.9
Classical Music	17.8%	40.0
Latin or Salsa Music	14.9%	33.5
Opera	4.9%	11.0
Musical Plays	7.9%	17.8
Non-Musical Plays	6.8%	15.3
Dance	8.0%	18.0
Programs about the visual arts	15.0%	33.7
Programs about books/writers	15.0%	33.7

As in previous years, more Americans view or listen to broadcasts and recordings of arts events than attend them live.

- The sole exception is live theater, which still attracts more adults than broadcasts or recordings of plays or musicals (online media included).
- Classical music broadcasts or recordings attract the greatest number of adult listeners, followed by Latin or salsa music.
- 33.7 million Americans listened to or watched programs or recordings about books.



Recreation Activity and Facility Trends: There continues to be very strong growth in the number of people participating in recreation and leisure activities. The Physical Activity Council in its 2013 study indicated that 33% of Americans (age 6 and older) are active to a healthy level. However, the study also indicated that 28% of Americans were inactive. It is estimated that one in five Americans over the age of six participates in some form of fitness related activity at least once a week. American Sports Data, Inc. reported that membership in U.S. health clubs has increased by 10.8% from 2009 to 2010, and memberships in health clubs reached an all-time high of 50.2 million in 2010. Statistics also indicate that approximately 12 out of every 100 people of the U.S. population (or 12%) belong to a health club. On the other side most public recreation centers attract between 20% and 30% of a market area (more than once) during the course of a year. All of this indicates the relative strength of a market for a community recreation facility. However, despite these increases the American population as a whole continues to lead a rather sedentary life with an average of 25% of people across the country reporting that they engage in no physical activity (according to The Center for Disease Control).

One of the areas of greatest participant growth over the last 10 years is in fitness related activities such as exercise with equipment, aerobic exercise and group cycling. This is also the most volatile area of growth with specific interest areas soaring in popularity for a couple of years only to be replaced by a new activity for the coming years. Also showing particularly strong growth numbers are ice hockey and running/jogging while swimming participation remains consistently high despite recent drops in overall numbers. It is significant that many of the activities that can take place in an indoor recreation setting are ranked in the top fifteen in overall participation by the National Sporting Goods Association.

Below are listed those sports activities that would often take place either in an indoor community recreation facility, or in close proximity to, and the percentage of growth or decline that each has experienced nationally over the last 10 years (2003-2012).



<u>Table AD – National Activity Trend (in millions)</u>

Sport/Activity	2012 Participation	2003 Participation	Percent Change
Yoga ⁶	22.9	6.3	+263.5%
Wrestling ⁷	2.8	1.3	+115.4%
Running/Jogging	40.0	22.9	74.7%
Aerobic Exercising	44.8	28.0	60.0%
Gymnastics	5.7	3.9	46.2%
Exercise Walking	102.1	79.5	28.4%
Weight Lifting	31.1	25.9	20.1%
Workout @ Club	35.2	29.5	19.3%
Exercising w/ Equipment	57.7	48.6	18.7%
Swimming	48.6	47.0	3.5%
Volleyball	10.3	10.5	-1.0%
Basketball	25.6	27.9	-8.2%
Cheerleading	3.3	4.1	-19.5%
Billiards/Pool	21.8	30.5	-28.5%

2012 Participation: The number of participants per year in the activity (in millions) in the United States.2003 Participation: The number of participants per year in the activity (in millions) in the United States.

Percent Change: The percent change in the level of participation from 2003 to 2012.

Aquatic Activity and Facility Trends: Without a doubt the hottest trend in aquatics is the leisure pool concept. This idea of incorporating slides, current channels, fountains, zero depth entry and other water features into a pool's design has proved to be extremely popular for the recreational user. The age of the conventional pool in most recreational settings has been greatly diminished. Leisure pools appeal to the younger children (who are the largest segment of the population that swim) and to families. These types of facilities are able to attract and draw larger crowds and people tend to come from a further distance and stay longer to utilize such pools. This all translates into the potential to sell more admissions and increase revenues. It is estimated conservatively that a leisure pool can generate up to 20% to 25% more revenue than a comparable conventional pool and the cost of operation, while being higher, has been offset through increased revenues. Of note is the fact that patrons seem willing to pay a higher user fee at a leisure pool than a conventional aquatics facility.

⁷ Since 2007 growth rate.



⁶ Since 2007 growth rate.

MARKET ANALYSIS Kuna, ID

Community Pool and Fitness Center Feasibility Study

Another trend that is growing more popular in the aquatic's field is the development of a raised temperature therapy pool for rehabilitation programs. This has usually been done in association with a local health care organization or a physical therapy clinic. The medical organization either provides capital dollars for the construction of the pool or agrees to purchase so many hours of pool time on an annual basis. This form of partnership has proven to be appealing to both the medical side and the organization that operates the facility. The medical sector receives the benefit of a larger aquatic center, plus other amenities that are available for their use, without the capital cost of building the structure. In addition, they are able to develop a much stronger community presence away from traditional medical settings. The facility operators have a stronger marketing position through an association with a medical organization and a user group that will provide a solid and consistent revenue stream for the center. This is enhanced by the fact that most therapy use times occur during the slower mid-morning or afternoon times in the pool and the center.

Despite the recent emphasis on recreational swimming and therapy, the more traditional aspects of aquatics (including swim teams, instruction and aqua fitness) remain as the foundation for many aquatic centers. The life safety issues associated with teaching children how to swim is a critical concern in most communities and competitive swim team programs through USA Swimming, high schools, and other community based organizations continue to be important. Aqua fitness, from aqua exercise to lap swimming, has enjoyed strong growth during the last ten years with the realization of the benefits of water-based exercise.

The multi-function indoor aquatic center concept of delivering aquatics services continues to grow in acceptance with the idea of providing for a variety of aquatics activities and programs in an open design setting that features a lot of natural light, interactive play features and access to an outdoor sundeck. The placing of traditional instructional/competitive pools, with shallow depth/interactive leisure pools and therapy water, in the same facility has been well received in the market. This idea has proven to be financially successful by centralizing pool operations for recreation service providers and through increased generation of revenues from patrons willing to pay for an aquatics experience that is new and exciting. Indoor aquatic centers have been instrumental in developing a true family appeal for community-based facilities. The keys to success for this type of center revolve around the concept of intergenerational use in a quality facility that has an exciting and vibrant feel in an outdoor like atmosphere.

Also changing is the orientation of aquatic centers from stand-alone facilities that only have aquatic features to more of a full-service recreation center that has fitness, sports and community based amenities. This change has allowed for a better rate of cost recovery and stronger rates of use of the aquatic portion of the facility as well as the other "dry side" amenities.

Due to the increasing recreational demands there has been a shortage in most communities of the following spaces:



- Gymnasiums
- Pools (especially leisure pools)
- Weight/cardiovascular equipment areas
- Indoor running/walking tracks
- Meeting/multipurpose (general program) space
- Senior's program space
- Pre-school and youth space
- Teen use areas
- Fieldhouses

As a result, many communities have attempted to include these amenities in public community recreation facilities. With the growth in youth sports and the high demand for school gyms, most communities are experiencing an acute lack of gymnasium space. Weight/cardiovascular space is also in high demand and provides a facility with the potential to generate significant revenues.

The success of most recreation departments is dependent on meeting the recreational needs of a variety of individuals. The fastest growing segment of society is the senior population and meeting the needs of this group is especially important now and will only grow more so in the coming years. Indoor walking tracks, exercise areas, pools and classroom spaces are important to this age group. Marketing to the younger more active senior (usually age 55-70) is paramount, as this age group has the free time available to participate in leisure activities, the desire to remain fit, and more importantly the disposable income to pay for such services.

Youth programming has always been a cornerstone for recreation services and will continue to be so with an increased emphasis on teen needs and providing a deterrent to juvenile crime. With a continuing increase in single parent households and two working parent families, the needs of school age children for before and after school child care continues to grow as does the need for preschool programming.

As more and more communities attempt to develop community recreation facilities the issues of competition with other providers in the market area have inevitably been raised. The loudest objections have come from the private health club market and their industry voice IHRSA. The private sector has vigorously contended that public facilities unfairly compete with them in the market and have spent considerable resources attempting to derail public projects. However, the reality is that in most markets where public community recreation centers have been built, the private sector has not been adversely affected and in fact in many cases has continued to grow. This is due in large part to the fact that public and private providers serve markedly different markets. One of the other issues of competition comes from the non-profit sector (primarily YMCA's but also JCC's, and others), where the market is much closer to that of the public providers. While not as vociferous as the private providers, the non-profits have also often expressed concern over public community recreation centers. What has resulted from this is a



strong growth in the number of partnerships that have occurred between the public and non-profit sector in an attempt to bring the best recreation amenities to a community.

Community Center Benchmarks: Based on market research conducted by Ballard*King & Associates at community recreation centers across the United States, the following represents the basic benchmarks.

- The majority of community centers that are being built today are between 65,000 and 75,000 square feet. Most centers include three primary components A) A pool area usually with competitive and leisure amenities, B) Multipurpose gymnasium space, and C) Weight/cardiovascular equipment area. In addition, most centers also have group exercise rooms, drop-in childcare, and classroom and/or community spaces.
- For most centers to have an opportunity to cover all of their operating expenses with revenues, they must have a service population of at least 50,000 and an aggressive fee structure.
- Most centers that are between 65,000 and 75,000 square feet have an operating budget of between \$1,500,000 and \$1,800,000 annually. Nearly 65% of the operating costs are from personnel services, followed by approximately 25% for contractual services, 8% for commodities, and 2% for capital replacement.
- For centers that serve a more urban population and have a market driven fee structure, they should be able to recover 70% to 100% of operating expenses. For centers in more rural areas the recovery rate is generally 50% to 75%. Facilities that can consistently cover all of their operating expenses with revenues are rare. The first true benchmark year of operation does not occur until the third full year of operation.
- The majority of centers of the size noted (and in an urban environment) above average daily paid attendance of 800 to as much as 1,000 per day. These centers will also typically sell between 800 and 1,500 annual passes (depending on the fee structure and marketing program).
- It is common for most centers to have a three-tiered fee structure that offers daily, extended visit (usually punch cards) passes, and annual passes. In urban areas it is common to have resident and non-resident fees. Non-resident rates can cost 25% to 50% higher than the resident rate and are usually a topic of discussion amongst elected officials. Daily rates for residents average between \$3.00 and \$6.00 for adults, \$3.00 and \$4.00 for youth and the same for seniors. Annual rates for residents average between \$200 and \$300 for adults, and \$100 and \$200 for youth and seniors. Family annual passes tend to be heavily discounted and run between \$350 and \$800.



• Most centers are open an average of 105 hours a week, with weekday hours being 5:00 am to 10:00 pm, Saturdays 8:00 am to 8:00 pm and Sundays from noon to 8:00 pm. There is now a trend to open earlier on Sundays as well. Often hours are shorter during the summer months.

Note: These statistics vary by regions of the country.

Recreation Facilities Market Orientation: Based on the demographic makeup of the service areas and the trends in indoor recreation amenities, there are specific market areas that need to be addressed with such community facilities. These include:

General:

- **1. Drop-in recreation activities** Critical to the basic operation of any community recreation center is the availability of the facility for drop-in use by the general public. This requires components that support drop-in use and the careful scheduling of programs and activities to ensure that they do not dominate the center and exclude the drop-in user. The sale of annual passes and daily admissions, potential strong revenue sources for a center, requires a priority for drop-in use.
- **2. Instructional programming** The other major component of a community recreation center's operation is a full slate of programs in a variety of disciplines. The center should provide instruction for a broad based group of users in a number of program areas. The primary emphasis should be on teaching basic skills with a secondary concern for specialized or advanced instruction.
- **3. Special events** There should be a market for special events including kid's birthday parties, community organization functions, sports tournaments and other special activities. The development of this market will aid significantly in the generation of additional revenues and these events can often be planned for before or after regular operating hours or during slow use times of the year. Care should be taken to ensure that special events do not adversely impact the everyday operations of the center.
- **4.** Community rentals Another aspect of a center's operation is providing space for rentals by civic groups or organizations as well as the general public. Gyms and multi-purpose rooms can be used as a large community gathering space and can host a variety of events from seminars, parties, receptions, arts and crafts sales and other events. It is important that a well-defined rental fee package is developed and the fee schedule followed closely. Rentals should not be done at the expense of drop-in use or programming in the center.
- **5. Social welfare programs** An emerging area for many centers is the use of space for social service activities and programs. Special population activities, teen and senior assistance programs, childcare and other similar uses are now common in many facilities.



Specific market segments include:

- **1. Families** Within most markets an orientation towards family activities is essential. The ability to have family members of different ages participate in a variety of activities together or individually, is the challenge.
- **2. Pre-school children** The needs of pre-school age children need to be met with a variety of activities and programs designed for their use. From drop-in childcare to specialized pre-school classes, a number of such programs can be developed. Interactive programming involving parents and toddlers can also be beneficial. It is significant that this market usually is active during the mid-morning time frame, providing an important clientele to the facility during an otherwise slow period of the day. For parents with small children who wish to participate in their own activities, babysitting services are often necessary during the morning and early evening time slots.
- **3. School age youth** Recreation programming has tended to concentrate on this market segment and this age group should be emphasized at a center as well. This group requires a wide variety of programs and activities that are available after school, during the summer, or during weekend hours. Instructional programs and competitive sports programs are especially popular, as well as drop-in use of the facility.
- **4. Teens** A major focus of many community recreation center projects is on meeting the needs of teenagers in the community. There is a great debate among recreation providers throughout the country on how to best provide recreation programming for this age group. Some believe that dedicated teen space is required to meet their needs while others find that it is the activities and approach that is more important. Serving the needs of this age group will often require the use of many areas of the center at certain "teen" times of use.
- **5. Seniors** As the population of the United States and the service areas continue to age, continuing to meet the needs of an older senior population will be essential. As has been noted, a more active and physically oriented senior is now demanding services to ensure their continued health. Social programs as well as weight training and cardiovascular conditioning have proven to be popular with this age group. Again, the fact that this market segment will usually utilize a facility during the slower use times of early to mid-day also is appealing. Providing services for this age group should be more of a function of time than space.
- **6. Business/corporate** This market has a variety of needs from fitness/wellness and instruction, to recreation and social. The more amenities and services that can be offered at one location the more appeal there is to this market segment. The business community should be surveyed to determine their specific needs and expectations.



- **7. Special needs population** This is a secondary market, but with the A.D.A. requirements and the existence of a number of recreation components, the amenities will be present to develop programs for this population segment. Association with health care providers and/or other social service agencies will be necessary to fully reach this market.
- **8. Special interest groups** This is a market that needs to be explored to determine the use potential from a variety of groups. These could include school functions, social service organizations and adult and youth sports teams. While the needs of these groups can be great, their demands on a center can often be incompatible with the overall mission of the facility. Care must be taken to ensure that special interest groups are not allowed to dictate use patterns for the center.

Service Area Providers: There are a number of facilities in the greater Kuna market area that are supplying aquatic, recreation, fitness, and sports activities. The following is a brief review of each of the major providers in the area.

Public

There are relatively few full-service public community recreation centers in the Kuna market service area.

Nampa Recreation Center – Even though this facility is located well to the west and north of the Kuna market, it is a large community recreation center that includes a significant indoor competitive and leisure pool, gym, weight/cardio area, track, racquetball courts, climbing wall, senior center and youth area.





Non-Profit

The non-profit sector has a significant presence in the greater Kuna area. The Boys & Girls Club will be a partner in the project and the Treasure Valley YMCA has a number of existing facilities.

Kuna Boys & Girls Club – The club is planning to build a new facility in concert with the planned new Kuna Community Pool and Wellness Center. They would fund their portion of the building that would include a teen center, computer lab, technology center, education center, game room, arts and multipurpose room and a possible kitchen/cafeteria area. They would hope to share use of the gym in the Community Pool and Wellness Center.

Treasure Valley YMCA – The YMCA has large facilities in Boise and Caldwell and a smaller center just north of I-84 in Meridian called Home Court that has a large gym area and fitness center. There are long range plans to build a full-service YMCA in Meridian and this will be located south of I-84 on Overland Rd. This center could have an impact on the Kuna market. There has been some discussion about having the YMCA be the contract operator of the Kuna Community Pool and Fitness Center.



Private

The other major provider of more fitness based activities is the private sector. There are two clubs located in Kuna itself.

Freedom Fitness – This family owned center has a weight/cardio area, group exercise studio and kid's fitness area.



Anytime Fitness – This facility is open 24 hours with an access code and it features a weight/cardio equipment area.





Beyond these two clubs there are a significant number of other facilities primarily located north of Kuna. These include:

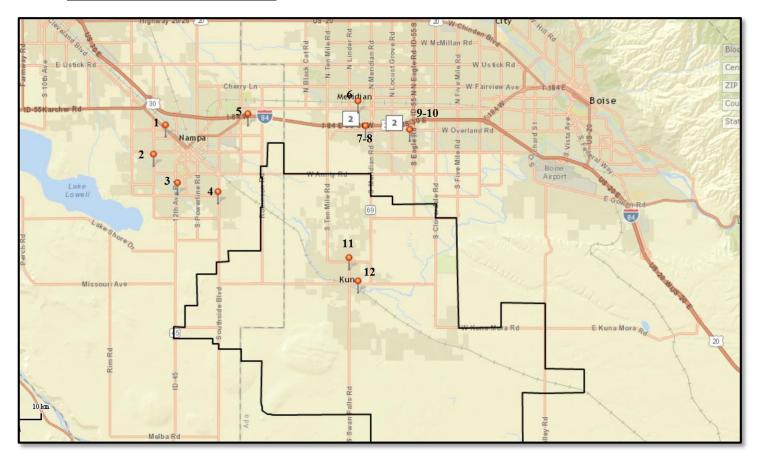
Axiom Fitness - Meridian
KoKo Fit Club - Meridian
Idaho Athletic Club-Silverstone-Meridian
Dream Body Fitness- Meridian
Anytime Fitness (2) – Nampa
Idaho Athletic Club – Nampa
River City Racquet Club – Nampa

It is likely that some of these existing private providers may have a concern over the possibility that a new public center (if it contains fitness amenities) would adversely impact their market and they may very well oppose the project as a result. However, private fitness clubs typically serve very different clientele and usually do not compete head to head for the same users. It is conservatively estimated that well over 50% of the users of a public facility will have never been to a private facility and would have no interest in joining such a center.

This is a representative listing of alternative recreation facilities in the area and is not meant to be a total accounting of all service providers. There may be other facilities located in the greater Kuna area that have an impact on the market as well.



Map F - Other Providers Map



- 1. Anytime Fitness
- 2. River City Racquet Club
- 3. Nampa Recreation Center
- 4. Anytime Fitness
- 5. Idaho Athletic Club
- 6. YMCA Home Court
- 7. Axiom Fitness
- 8. Dream Body Fitness
- 9. KoKo FitClub
- 10. Idaho Athletic Club
- 11. Anytime Fitness
- 12. Freedom Fitness



After analyzing the other indoor recreation, sports and fitness providers, there should be a small market for a public Community Pool and Fitness Center in Kuna. Despite the relatively small population in the market, there is no indoor public swimming pool in the area, limited gyms (school facilities only), and really no public access to fitness and wellness space. As a result the market is currently under served.

Market for a Community Pool and Fitness Center: With any proposed community pool and fitness center the issue of the size and qualification of the market for such a facility comes to the forefront.

Reviewing the characteristics of the various markets indicates:

The population of the City of Kuna is just below 16,000 (2013 estimate) which is not really large enough to support a comprehensive community pool and fitness center. Additional users will have to come from the Primary Service Area which would place the total service area population at just under 28,000. This is a more adequately sized population base to support a center.

The population of the area is expected to show steady growth for the next five years which will help to contribute a number of potential additional users for the facility.

The population of the City of Kuna is younger than the national median level, has a large number of children, and has a reasonably high median household income level. The Primary Service Area has a population that is very similar.

The private sector hopes to capture between 10% and 15% of a market area (generally in a 3 to 5 mile radius of the club) while the public sector facilities target a market of 20% to 30% of an area within a 10 to 15 minute driving distance. Non-profits will have a market draw that is somewhere between the two. These differences are directly related to the business practices of the three types of entities. Private facilities are generally a membership based operation where revenues are almost exclusively derived from membership revenues and from program and service expenditures generated from these same individuals. As such it is relatively easy to project market dynamics (distance, eligible households, etc.) for this type of facility. The non-profit sector (YMCA's) takes the market a bit further, while still being largely membership based, they often have some limited daily admissions and actively pursue program only members. Program and service options also extend well beyond the sports and fitness area to include everything from child care, to cultural arts and social programs. This expands the market for recreation services to the 15% to 20% range. Public facilities on the other hand generally have readily accessible daily admissions, some form of extended passes as well as annual passes. In addition there are usually a large number of programs (again in areas beyond sports and fitness) that can be accessed without an annual pass and also a number of community functions and activities where no fee may be collected at all.



Most community wellness/recreation centers operate on an ala carte system which greatly expands the market to a broader spectrum of users based on age, income and travel time. As a result the 20% to 30% market penetration rate is obtainable and the geographic area served is generally much larger. It is not inconceivable that over the course of a year's time over 50% of a community's population will have come to a community wellness/recreation center for some use, function or activity. However, due to the variety of program and service options offered by the public sector, fewer annual passes are generally sold than private or non-profit facilities. On the other side it is relatively common to have individuals and families who have memberships at private or non-profit facilities to access public centers for certain services that are either not offered by the others or are not providing them in a manner that meets their needs.

The market realities put public and private facilities at the opposite end of the market spectrum with the non-profits in the middle but closer to the public market.

The ability of a fitness, sports or recreation facility to capture a market share is based in large part on the amenities that are included in a center, the variety of amenities available, the size of the facility and the fees that are going to be charged.

Based on the information noted above the following estimates are possible.

There are estimated to be approximately 28,000 individuals in the Primary Service Area. If 10% are captured by the private sector (a relatively large percentage since there are a number of private providers) this would result in approximately 2,800 memberships.

Figuring that 10% of the market is being satisfied with the private providers that still leaves the difference between the public and private market rate at 20%. Since there is one public recreation center in Nampa and the YMCA has a facility on the fringe of the market area that potentially leaves at least 15% for a Kuna Community Pool and Fitness Center. Capturing 15% of Kuna Primary Service area market would convert to approximately 4,200 users that could be potential annual pass holders.

Another method to analyze possible participation numbers is to look at the pre-qualified population that is likely to participate in wellness and sports activities and look at the realistic percentage of that market that can be captured by a facility. Weekly participation in active recreation activities from individuals in the Kuna Primary Service Area can be expected to be somewhere in the range of 15% to 20% of the population which equals approximately 4,200 to 5,600 individuals, (based on 2013 population estimates). If a new center were able to capture as little as 25% of this prequalified market this would convert to 1,050 to as many as 1,400 potential annual pass holders. Participation rates for more passive oriented facilities are more difficult to project due to the lack of reliable utilization rates for such activities, but the level of use is below that of a more active facility and the potential service area is also considerably smaller as well.



Market Conclusion:

Below are listed some of the market opportunities and challenges that exist with this project.

Opportunities

- The demographic characteristics in the Primary Service Area indicate a younger population with a large number of children.
- Both service areas have a relatively high median household income level.
- The population will continue to grow at a steady pace.
- There is not a comprehensive, family focused, public wellness/recreation center in the immediate Kuna market.
- There is no indoor public pool in the immediate Kuna area.
- An indoor family focused pool and fitness center improves the quality of life in a community and often serves to bring more unity to a diverse population base.

Challenges

- There are a number of existing private facilities in the greater Kuna area. Most of these facilities have a strong fitness orientation. There is also a high probability of a new YMCA being built in Meridian in the coming years.
- The overall Primary Service Area population is still somewhat undersized to support a significant public pool and fitness center. As a result, to enhance the market, partnerships with other organizations (Boys & Girls Club and schools) will be important.
- Funding not only the development but the operation of an indoor pool and fitness center will have to be clearly defined.



Section II – Survey Results

In addition to a number of stakeholder and community meetings, a statistically valid survey of residents of the potential recreation district was conducted.

Leisure Vision conducted the survey on behalf of the City of Kuna in April of 2014. The purpose of the survey was to establish priorities for the possible development of an indoor community center/aquatic center. The survey was designed to obtain statistically valid results from households throughout the City of Kuna and the surrounding area. The survey was administered by a combination of mail and phone.

Leisure Vision worked extensively with City of Kuna officials, as well as members of the Ballard*King & Associates project team, in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to effectively plan the future facility.

A seven-page survey was mailed to a random sample of 1,500 households throughout the City of Kuna area. Approximately three days after the surveys were mailed, each household that received a survey also received an automated voice message encouraging them to complete the survey. In addition, about two weeks after the surveys were mailed Leisure Vision began contacting households by phone. Those who indicated they had <u>not</u> returned the survey were given the option of completing it by phone.

The goal was to obtain a total of at least 300 completed surveys. This goal was far exceeded, with a total of 541 surveys having been completed. The level of confidence is 95% with a margin of error of +/-4.2%.

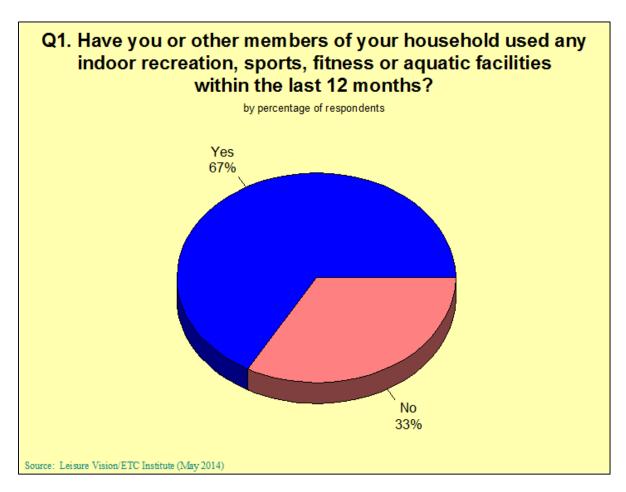
The following pages summarize major survey findings.



Use of Indoor Recreation, Sports, Fitness or Aquatic Facilities

Respondents were asked if any members of their household have used indoor recreation, sports, fitness, or aquatic facilities within the past 12 months. The following summarizes key findings:

• Sixty-seven percent (67%) of households have used indoor recreation, sports, fitness, or aquatic facilities in the past 12 months.

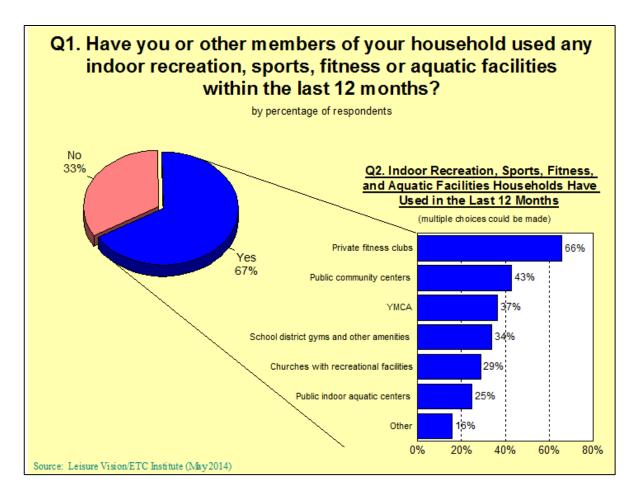




Indoor Recreation, Sports, Fitness or Aquatic Facilities Used

From a list of six options, households that have used indoor recreation, sports, fitness, or aquatic facilities within the past 12 months were asked to indicate all of the facilities they've used. The following summarizes key findings:

• Of the 67% of households that have used indoor recreation, sports, fitness or aquatic facilities over the past 12 months, 65% of have used private fitness clubs. In addition, 43% have used public community centers, and 37% have used the YMCA.

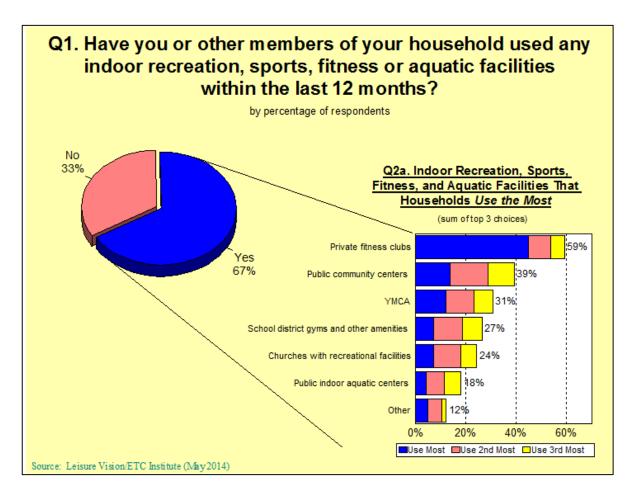




Indoor Recreation, Sports, Fitness or Aquatic Facilities <u>Used the Most</u>

From a list of six options, households that have used indoor recreation, sports, fitness, or aquatic facilities within the past 12 months were asked to select the three facilities they use the most. The following summarizes key findings:

Based on the sum of the top three choices for households that have used indoor recreation, sports, fitness or aquatic facilities in the past 12 months, the facilities that households have used the most are: private fitness clubs (59%), public community centers (39%), and YMCA (31%).

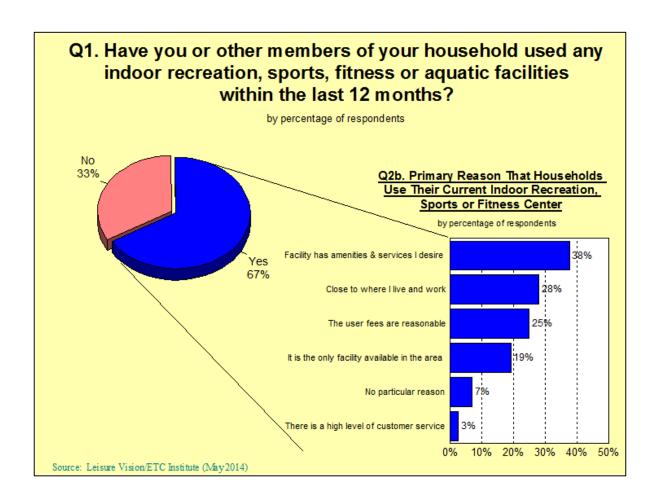




Reasons Households Use Indoor Recreation, Sports, Fitness or Aquatic Facilities

From a list of six options, households that have used indoor recreation, sports, fitness, or aquatic facilities within the past 12 months were asked to indicate all of the reasons they use the facilities they're currently using. The following summarizes key findings:

• Of the 67% of households that have used indoor recreation, sports, fitness or aquatic facilities over the past 12 months, the most frequently mentioned reasons that households are using their current facilities are: "facility has amenities and services I desire" (38%), "close to where I live and work" (28%), and "user fees are reasonable" (25%).

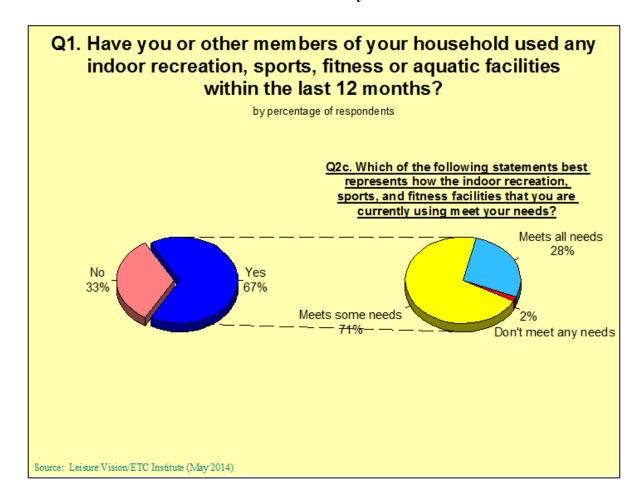




How Well Indoor Recreation, Sports, Fitness or Aquatic Facilities Meet the Needs of Households

Households that have used indoor recreation, sports, fitness, or aquatic facilities within the past 12 months were asked to indicate how well the facilities they are currently using meet their needs. The following summarizes key findings:

• Of the 67% of households that have used indoor recreation, sports, fitness or aquatic facilities over the past 12 months, 28% indicated that the facilities they're currently using meets <u>all</u> of their needs, 71% indicated that the facilities meet <u>some</u> of their needs, and 2% indicated that the facilities don't meet any of their needs.

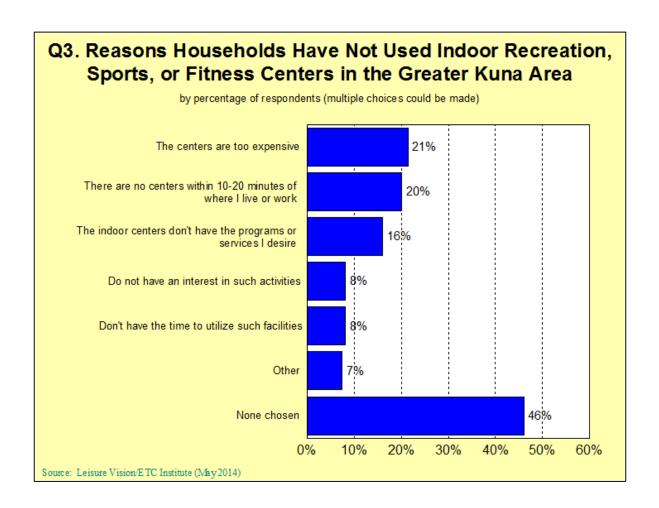




Reasons Households Have Not Used Indoor Recreation, Sports, Fitness or Aquatic Facilities

From a list of four options, respondents were asked to select the reasons their household have not used indoor recreation, sports, fitness and aquatic facilities in the greater Kuna area. The following summarizes key findings:

■ Twenty-one percent (21%) of households have not used indoor recreation, sports, or fitness centers in the greater Kuna area because they're too expensive, and 20% have not used them because there are no centers within 10-20 minutes of where they live or work.

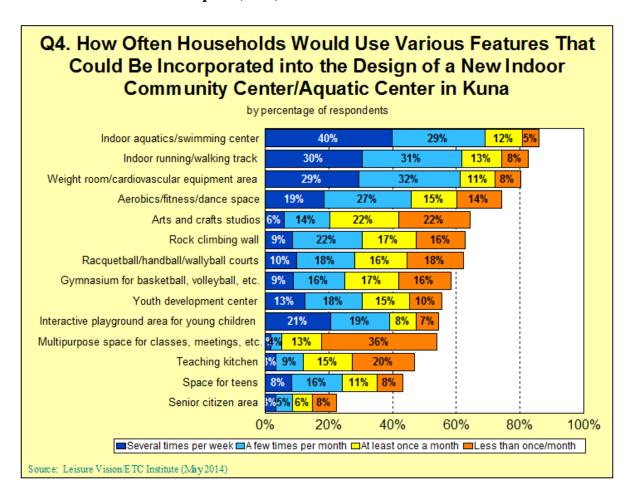




How Often Households Would Use Various Features That Could Be Included in a New Community Center

From a list of 14 various features that could be included in a new indoor community center, respondents were asked to indicate how often their household would use each feature. The following summarizes key findings:

■ The features that the highest percentage of respondents would use at least once a month in a new community center include: indoor aquatics/swimming center (81%), indoor running/walking track (74%), weight room/cardiovascular equipment area (72%), and aerobics/fitness/dance space (61%).

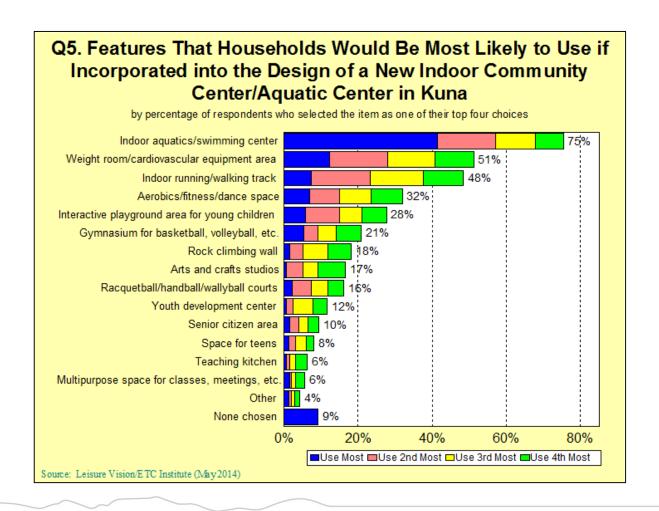




Features Households Would Be Most Likely to Use in a New Community Center

From a list of 14 various features that could be included in a new indoor community center, respondents were asked to select the four that their household would be most likely to use. The following summarizes key findings:

■ Based on the sum of their top four choices, the features that households would be most likely to use in a new community center are: indoor aquatics/swimming center (75%), weight room/cardiovascular equipment area (51%), an indoor running/walking track (48%), and aerobics/fitness/dance/ space (32%). It should also be noted that an indoor aquatics/swimming center had the highest percentage of respondents select it as their <u>first choice</u> as the feature their household would be most likely to use.

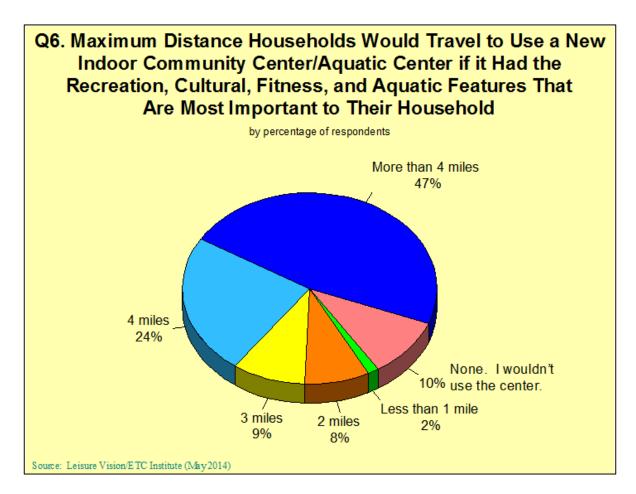




Maximum Distance Households Would Travel to Use a New Indoor Community/Aquatic Center

Respondents were asked to indicate the maximum distance they would travel to use a new indoor community/aquatic center if it had the features that are most important to their household. The following summarizes key findings:

■ Forty-seven percent (47%) of respondents would travel more than 4 miles to use a new indoor community/aquatic center with the features most important to their household, and an additional 24% of households would travel 4 miles to use a new indoor community aquatic center.

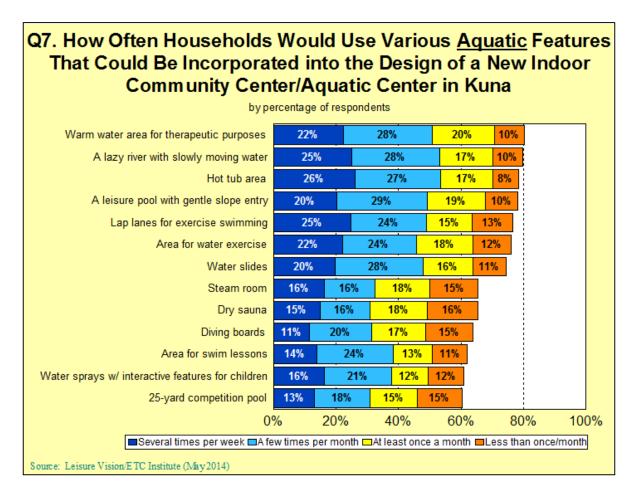




How Often Households Would Use Various <u>Aquatic</u> Features That Could Be Included in a New Community Center

From a list of 14 various <u>aquatic</u> features that could be included in a new indoor community center, respondents were asked to indicate how often their household would use each feature. The following summarizes key findings:

■ The aquatic features that the highest percentage of respondents would use at least once a month in a new community center include: warm water area for therapeutic purposes (70%), a lazy river with slowly moving water (70%), a hot tub area (70%), and a leisure pool with gentle slope entry (68%).

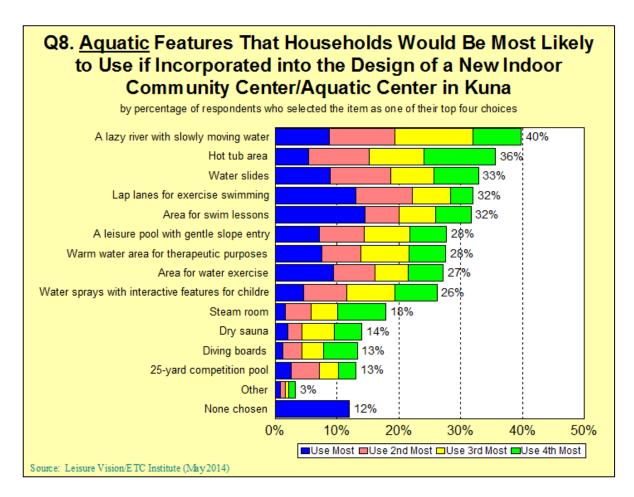




Aquatic Features Households Would Be Most Likely to Use in a New Community Center

From a list of 14 various aquatic features that could be included in a new indoor community center, respondents were asked to select the four that their household would be most likely to use. The following summarizes key findings:

■ Based on the sum of their top four choices, the aquatic features that households would be most likely to use in a new community center are: a lazy river with slowly moving water (40%), hot tub area (36%), water slides (33%), lap lanes for exercise swimming (32%), and an area for swim lessons (32%). It should also be noted that an area for swim lessons had the highest percentage of respondents select it as their <u>first choice</u> as the aquatic feature their household would be most likely to use.

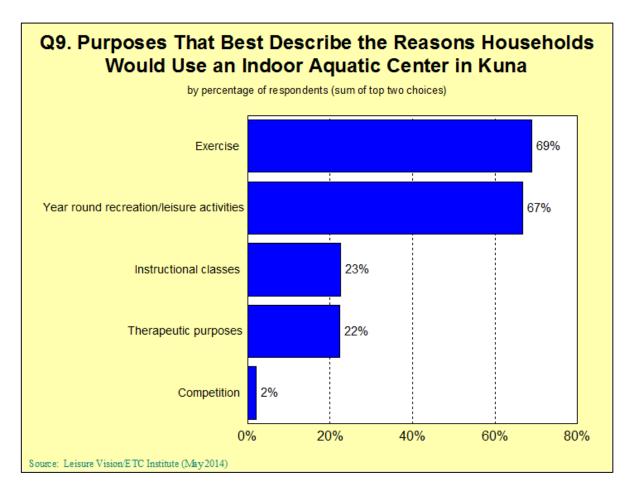




Reasons Respondents Would Use an Indoor Aquatic Center

From a list of five options, respondents were asked to select the top two reasons their household would use an indoor aquatic center. The following summarizes key findings:

Based on the sum of their top two choices, the most frequently mentioned reasons that households would use an indoor aquatic center are exercise (69%) and year round recreation/leisure activities (67%).

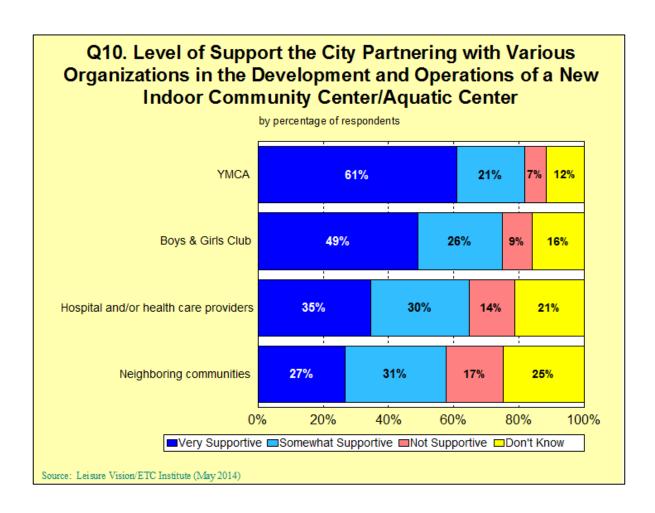




Level of Support for Partnering with Various Organizations in Developing & Operating a New Indoor Community/Aquatic Center

Respondents were asked how supportive they are of the City partnering with various organizations in the development and operations of a new indoor community/aquatic center. The following summarizes key findings:

■ Eighty-two percent (82%) of respondents are either very supportive or somewhat supportive of the City partnering with the YMCA in the development and operations of a new indoor community/aquatic center, and 75% are very supportive or somewhat supportive of the City partnering with the Boys and Girls Club.

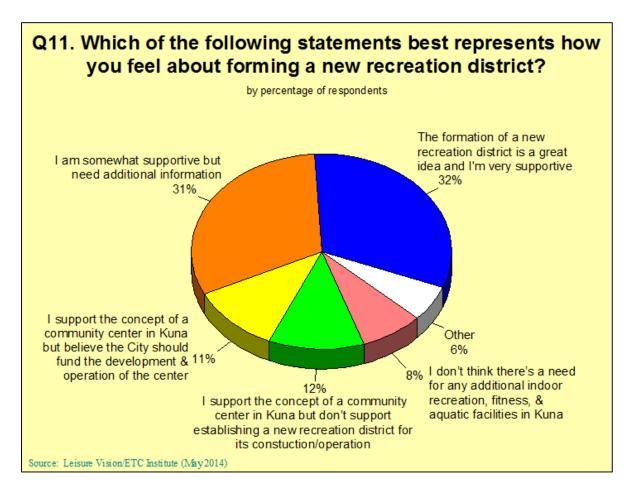




How Respondents Feel About Forming a New Recreation District

Respondents were asked to indicate how they feel about the formation of a new recreation district that covers the city and surrounding area. The following summarizes key findings:

■ Thirty-two percent (32%) of respondents feel the formation of a new recreation district is a great idea and are very supportive, and 31% are somewhat supportive of forming a new recreation district, but need additional information.

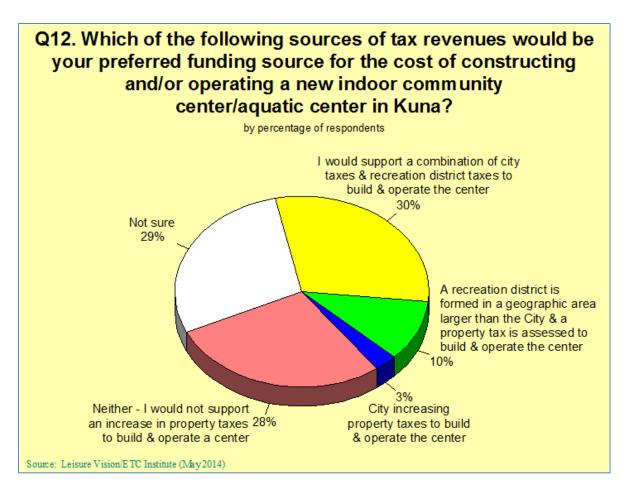




Preferred Tax Revenue Funding Sources for a New Indoor Community/Aquatic Center

From a list of five options, respondents were asked to indicate their preferred funding source for the cost of constructing and operating a new indoor community/aquatic center in Kuna. The following summarizes key findings:

• Thirty percent (30%) of respondents support a combination of city taxes and recreation district taxes to build and operate a new indoor community center.

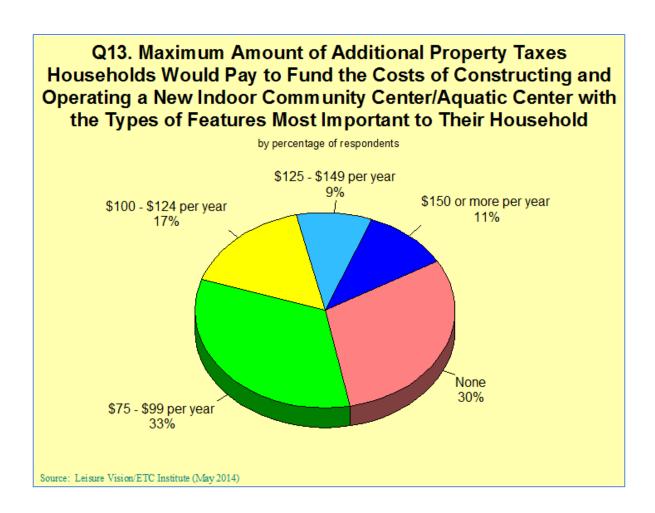




Paying Additional Property Taxes to Fund the Costs for a New Indoor Community/Aquatic Center

From a list of five options, respondents were asked to indicate the maximum amount of additional property taxes they would pay per year to fund the costs of constructing and operating a new indoor community/aquatic center with the features that are most important to their household. The following summarizes key findings:

■ Thirty-three percent (33%) of respondents would pay \$75-\$99 per year in additional taxes to fund the constructing/operating costs for a new indoor community/aquatic center. In addition, 17% of respondents would pay \$100-\$124 per year, 11% would pay \$150 or more per year, 9% would pay \$125-\$149 per year, and 30% indicated "none".

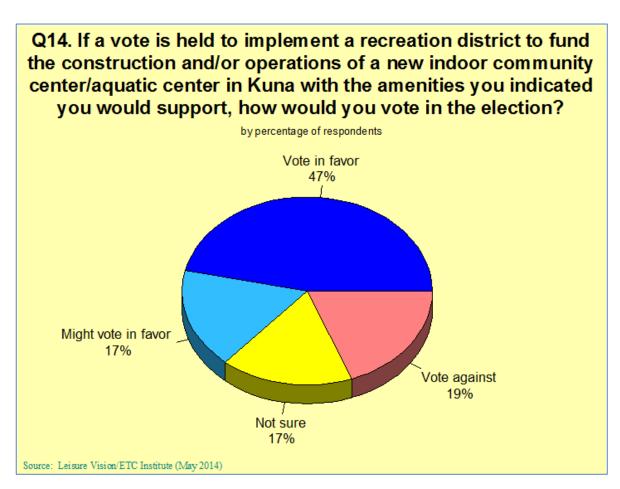




Voting on Implementing a Recreation District to Fund the Construction/Operation of New Indoor Community/Aquatic Center

Respondents were asked how they would vote to implement a recreation district to fund the construction/operation of a new indoor community/aquatic center with the amenities they most support. The following summarizes key findings:

• Forty-seven percent (47%) of respondents would vote in favor of implementing a recreation district to fund the construction/operation of a new indoor community/aquatic center. In addition, 17% of respondents indicated they might vote in favor, 19% would vote against, and 17% are not sure how they would vote.

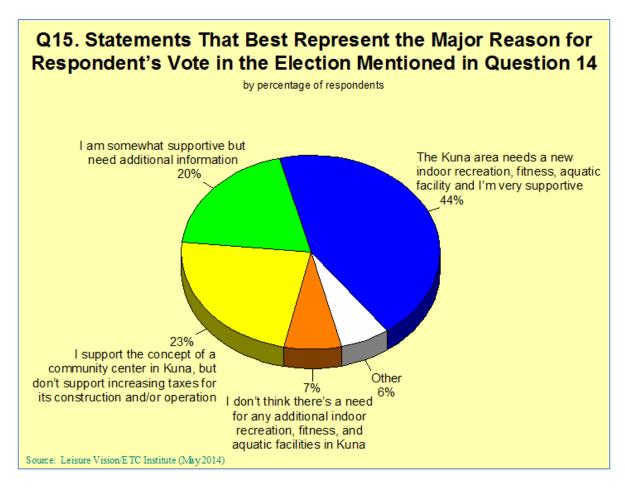




Reason for Respondent's Vote

Respondents were asked to indicate the reason for their response to voting on a recreation district to fund the construction/operation of a new indoor community/aquatic center with the amenities they most support. The following summarizes key findings:

• Forty-four percent (44%) of respondents feel the Kuna area needs a new indoor recreation, fitness, aquatic facility, and are very supportive of a recreation district to fund the construction/operation of a new indoor community/aquatic center.

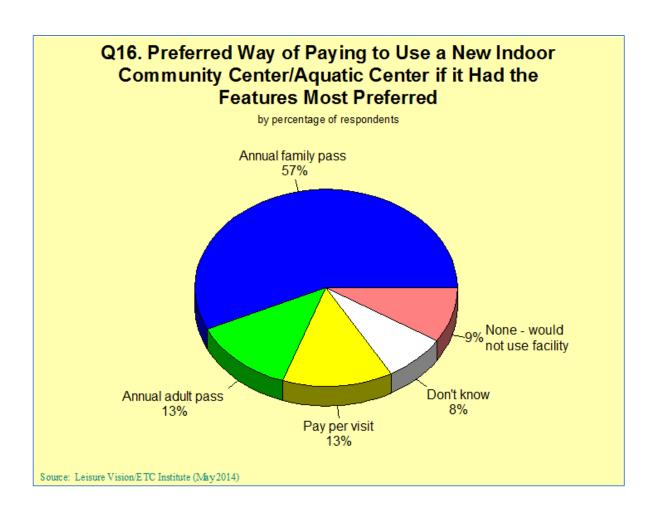




Preferred Way of Paying to Use an Indoor Aquatic Center

From a list of five options, households were asked to indicate the way they would prefer to pay to use an indoor community/aquatic center with the features they most prefer. The following summarizes key findings:

■ Fifty-seven percent (57%) of respondents prefer to pay with an annual family pass to use a new indoor community/aquatic center. In addition, 13% of respondents would prefer to pay with an annual adult pass, 13% would prefer to pay per visit, 8% indicated "don't know", and 9% indicated they would not use a new indoor community/aquatic center.

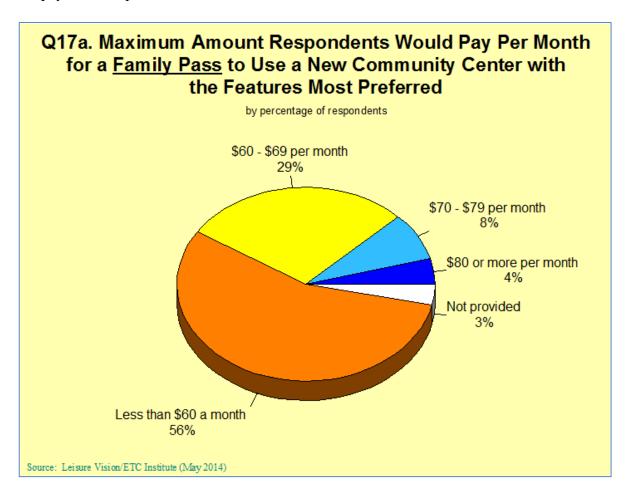




Maximum Amount Respondents Would Pay Per Month for a <u>Family Pass</u> to Use a New Indoor Community/Aquatic Center

Respondents were asked to indicate the maximum amount they would pay per month for a <u>family pass</u> to use a new indoor community/aquatic center if it had the features they most prefer. The following summarizes key findings:

• Fifty-six percent (56%) of respondents would pay less than \$60 per month for a family pass to use a new indoor community/aquatic center. In addition, 29% of respondents would pay \$60-\$69 per month.

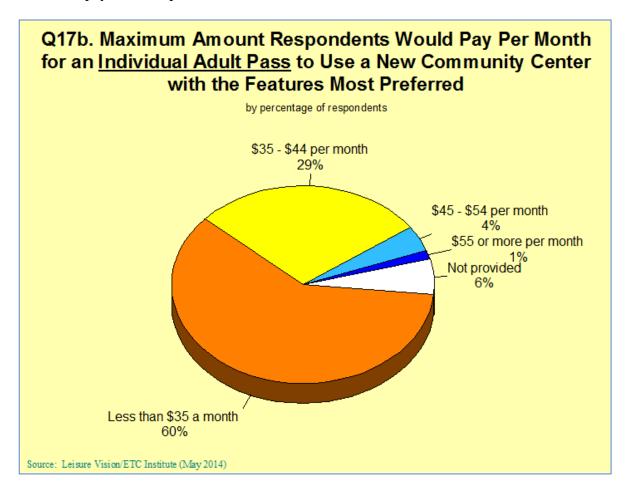




Maximum Amount Respondents Would Pay Per Month for an <u>Individual Adult</u> <u>Pass</u> to Use a New Indoor Community/Aquatic Center

Respondents were asked to indicate the maximum amount they would pay per month for an <u>individual adult pass</u> to use a new indoor community/aquatic center if it had the features they most prefer. The following summarizes key findings:

• Sixty percent (60%) of respondents would pay less than \$35 per month for an individual adult pass to use a new indoor community/aquatic center. In addition, 29% of respondents would pay \$35-\$44 per month.

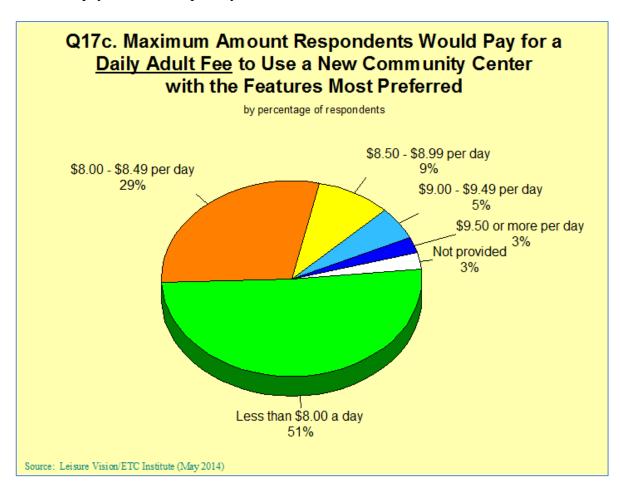




Maximum Amount Respondents Would Pay for a <u>Daily Adult Fee</u> to Use a New Indoor Community/Aquatic Center

Respondents were asked to indicate the maximum amount they would pay for a <u>daily adult fee</u> to use a new indoor community/aquatic center if it had the features they most prefer. The following summarizes key findings:

• Fifty-one percent (51%) of respondents would pay less than \$8.00 per day for a daily adult fee to use a new indoor community/aquatic center. In addition, 29% of respondents would pay \$8.00-\$8.49 per day.

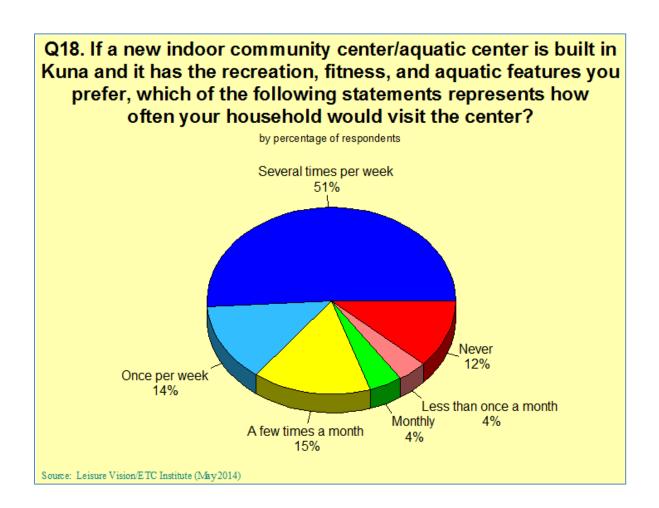




Frequency of Visiting a New Indoor Community/Aquatic Center

Respondents were asked to indicate how often their household would visit a new indoor community/aquatic center if it had the features they prefer. The following summarizes key findings:

• Fifty-one percent (51%) of households would visit a new indoor community/aquatic center several times a week if it had the features they prefer. In addition, 14% of households would use the center once a week, and 15% would use the center a few times a month.

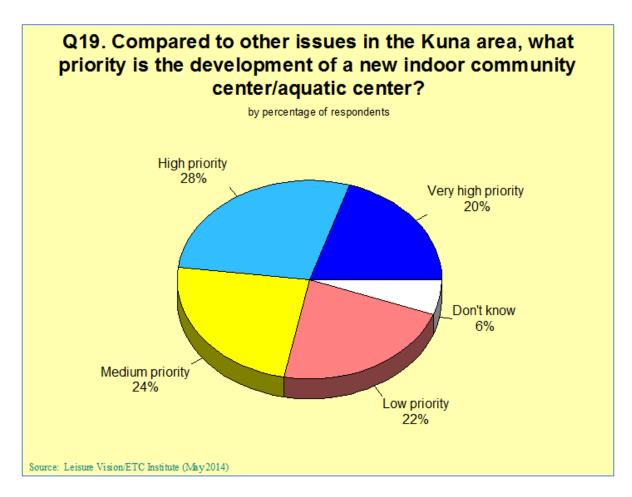




Priority of Developing a New Indoor Community/Aquatic Center

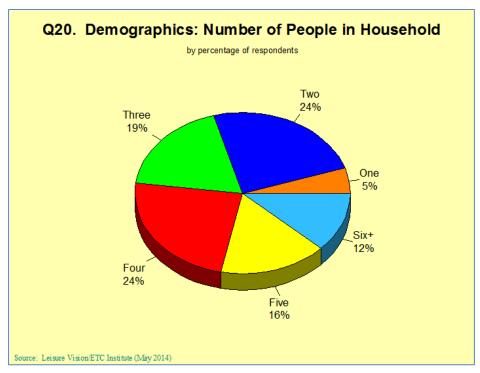
Respondents were asked to indicate how high of a priority should be placed on developing a new indoor community/aquatic center compared to other issues in the Kuna area. The following summarizes key findings:

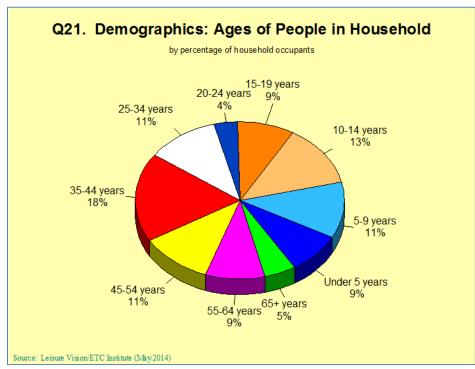
• Forty-eight percent (48%) of respondents feel that developing a new indoor community/aquatic center should be a very high or high priority. In addition, 24% of respondents feel it should be a medium priority, and 22% feel it should be a low priority.





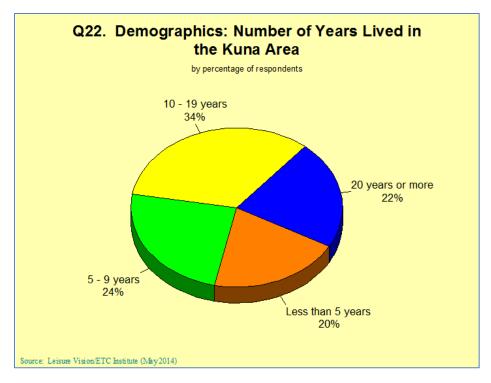
Demographics

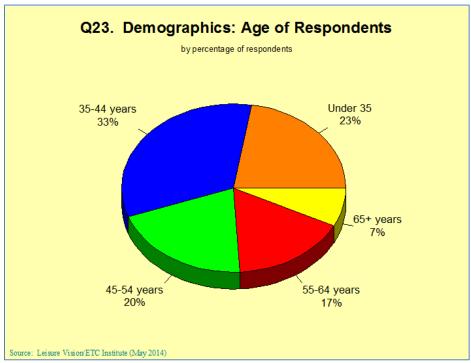






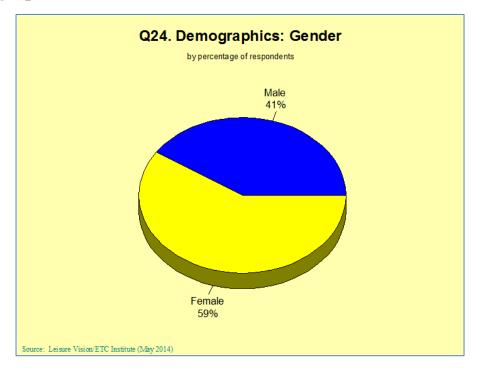
Demographics

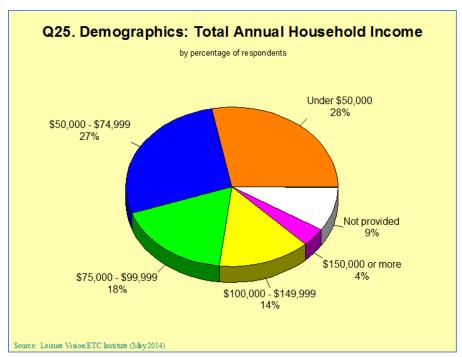






Demographics







<u>Section III – Center Program</u>

Utilizing the information that was gathered from the market analysis portion of the study and through input from the survey, a program plan has been developed for the proposed center.

Community / Aquatic Center		LCA Opsis
A Operations - Building Support Spaces	Proposed NASF	Core Add-On
A.01 Reception/Access Control/Registration	300	300
A.02 Vending Alcove	150	150
A.03 Locker Rooms - Men's	1,000	1,000
A.04 Locker Rooms - Women's A.05 Family/Special Needs Locker Vestibule (2 @ 170sf)	1,000 340	1,000 340
A.06 Family/Special Needs Changing Rooms (4 @ 175sf)	460	460
A.07 Maintenance/Storage/Workroom	500	500
Subtotal Building Operations Spaces	3,750	3,750
	Proposed	
B Operations - Administration Spaces	NASF	
B.01 Facility Manager	120	120
B.02 Recreation Supervisors(1 @ 120sf) B.03 Secretary/Receptionist (1 @ 80sf)	120 80	120 80
B.04 Recreation Specialists (2 @ 80sf)	160	160
B.05 Staff Breakroom / Conference Room B.06 Staff Restroom - Unisex	300 60	300 60
B.07 Workroom/Storage/Supplies	200	200
Subtotal - Administrative Office Spaces	1,040	1,040
	Proposed	
C Programs - Recreation Spaces	NASF	
C.01 Cardiovascular/Weight Room C.02 C/W Storage	3,000 50	3,000 50
C.03 Health Resource Room	150	150
C.04 Multi-Use Gymnasium (1 court w/ 2 cross courts)	8,500	8,500
C.05 Gymnasium Storage C.06 Group Exercise Room	500 2,000	500 2,000
C.07 Storage (large Multi-Purpose Exercise)	300	300
C.08 Running Track	4,500	4,500
Subtotal - Recreation Spaces	19,000	19,000
D Programs - Aquatic Spaces	Proposed NASF	
D.01 Recreational Pool w/ lap lanes (water 3,500sf)	7,500	7,500
D.02 6-Lane 25 Yard Pool (water 3,375 sf) outdoor pool	6,370	6,370
D.03 Aquatic's Office (2 staff)	150	150
D.04 First Aid Room D.05 Lifeguard Changing/Breakroom	80 400	80 400
D.06 Pool Storage	500	500
D.07 Pool Mechanical	1,100	1,100
Subtotal - Community Spaces	16,100	9,730 6,370
E Programs - Community Spaces	Proposed NASF	
E.01 Community Living Room / Lobby	800	800
E.02 Casual Activities Areas	500	500
E.03 Special Events Room (divisible 2-rooms)	700	700
E.04 Multi-Purpose Room (divisible 2-rooms) E.05 MC/CR Caterer's/Teaching Kitchen	2,400 600	2,400 600
E.06 MC/CR Public Restroom - Men	250	250
E.07 MC/CR Public Restroom - Women	250	250
E.08 MC/CR Storage (tables, chairs, activity) E.08 Drop-in Childcare	600 1,000	600 1,000
E.09 DC Storage / Restroom	200	200
Subtotal - Community Spaces	7,300	7,300

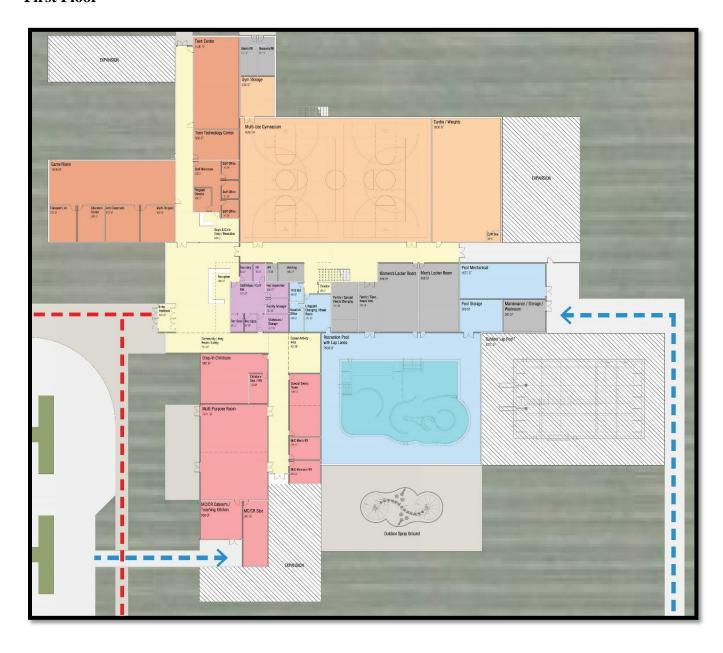


na Community / Aquatic Center			LC	CA Opsis Archit P ro
F Programs - Boys & Girls Club		Proposed NASF		
F 01 Entry/Reception F 02 Teen Center F 03 Teen Technology Center F 04 Games Room F 05 Computer Lab F 06 Education Center F 07 Arts Classroom F 08 Multipurpose Room F 09 Program Director Office F 10 Staff Offices (3) F 11 Staff Workroom F 12 Cafeteria F 13 Cafeteria Kitchen		550 1,500 500 2,000 350 350 450 450 150 380 250 1,000	550 1,500 500 2,000 350 350 450 450 450 250	1,000
Subtotal - Boys and Girls Club		8,210	6,910	1,300
Total Net Assignable Area		55,400	47,730	7,670
Building Grossing Efficiency Factor	75%	18,467	15,910	2,557

Section IV - Concept Plan

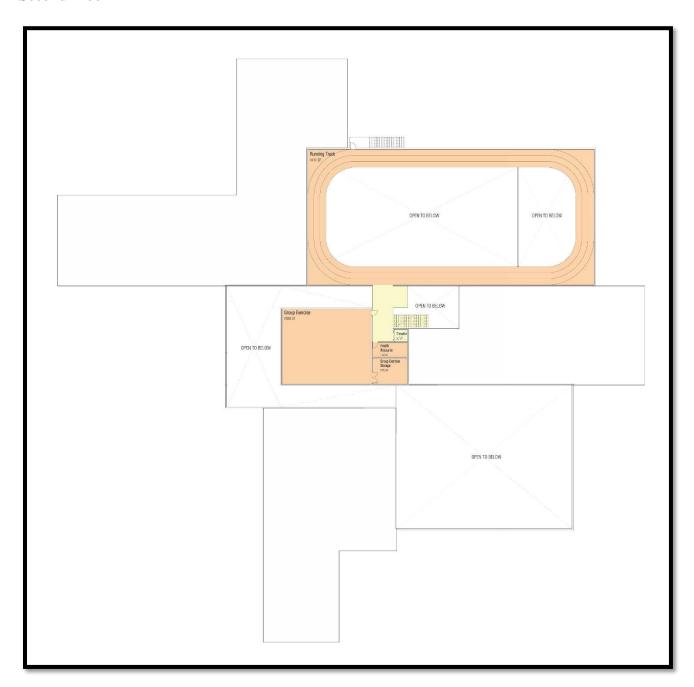
The following concept plans for the center have been developed by LCA Architects and Opsis Architecture.

First Floor





Second Floor





Site Plan







<u>Section V – Capital and Operational Estimates</u>

Capital Cost Projections

The following is a very preliminary capital cost estimate for the proposed center based on the program and concept plan for the facility. This estimate was developed by LCA Architects with Opsis Architecture and is based on the core building only.

Budget Estimates	Cost
Construction Cost Estimate	\$12,000,000
Soft Costs (furnishings and equipment, land	\$3,000,000
acquisition, design fees, contingency, etc.)	
Total Estimated Project Cost	\$15,000,000

A formal capital cost estimate will need to be completed for the proposed center in the future.

Operational Expense and Revenue Estimates

A basic operational estimate for the center has been developed by Ballard*King & Associates. This is basic, preliminary, operational cost and revenue estimate is based on the core program and concept plan for the center. Operational estimates does not include the Boys & Girls Club portion of the facility.

Assumptions

- The new center will be approximately 64,000 SF.
- The center will be operated by the proposed new recreation district.
- The possible financial participation of any partners (beyond the Boys & Girls Club) in the project has not been shown.
- The expenditure and revenue estimates are annual budget numbers.
- Revenues are based on a market driven rate structure and strong use of the center.
- The center would be open 7 days a week and approximately 100 hours a week.



CAPITAL & OPERATIONAL ESTIMATES



Community Pool and Fitness Center Feasibility Study

Budget Estimates	Low	High
Projected Expenses	\$1,600,000	\$1,750,000
Projected Revenues	\$1,000,000	\$1,300,000
Difference	(\$600,000)	(\$450,000)

It is expected that a much more exact and detailed operations plan will be developed as the project moves forward.